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1990 MOTORCYCLE STATISTICAL ANNUAL

MIC

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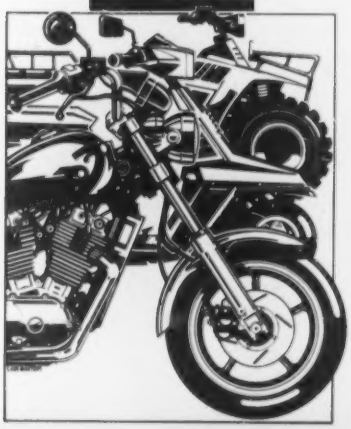
1990 MOTORCYCLE STATISTICAL ANNUAL



MIC

Compiled and edited by the
Motorcycle Industry Council, Inc.
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Irvine, California 92718

The cooperation of the many contributors to this annual is gratefully acknowledged. The source note below each table credits the various government and private organizations which have provided information for the Statistical Annual.

Cover and section illustrations by Hector Cademartori.

Additional copies may be obtained from the MIC Executive or Government Relations office.

MOTORCYCLE INDUSTRY COUNCIL, INC.

Motorcycling continues to be a popular recreational activity and source of transportation. An estimated 39 million people operated a motorcycle, scooter, or ATV in the past year, which is comparable to participation in other recreational activities such as camping (42 million), fishing (40 million), and golf (23 million). Motorcycles, scooters, and ATVs are also used by industry and government agencies in such varied applications as agriculture, law enforcement and land resource management.

There are currently about 6.6 million motorcycles, scooters, and ATVs operating in the U.S. Motorcycles and scooters represent almost two thirds (63%) of the vehicle population while three and four-wheeled all-terrain vehicles (ATVs) make up the remaining one third (37%). The motorcycle industry generated about 6.8 billion dollars in consumer sales and services, state taxes, and licensing fees in 1989.

Approximately 505,000 motorcycles, scooters, and ATVs were sold new in 1989 at an estimated value of 1.9 billion dollars. Off-highway motorcycles and ATVs accounted for over half (53%) of total retail sales while on-highway motorcycles and scooters made up the remaining 47%. Six major distributors accounted for roughly 99% of the annual motorcycle, scooter, and ATV retail sales.

In 1989 the motorcycle industry supported over 10,700 retail outlets selling either new vehicles or specializing in motorcycle related services, parts, and accessories. These outlets employed almost 50,000 people at an estimated annual payroll of $779 million. In the last several years many motorcycle retailers have expanded their business to include other products such as snowmobiles, personal watercraft, or other power products.

In 1987 the MIC launched a long term public awareness campaign, "Discover Today's Motorcycling", to stimulate greater interest, involvement and understanding of motorcycling among the general public. The MIC also sponsors a public service program to encourage motorcycle rider responsibility in noise reduction and environmental protection.

The MIC actively works with state and Federal government agencies to encourage intelligent land planning and management. MIC endorses multiple use, which is equitable to all outdoorsmen, including those who ride the 3.6 million motorcycles and ATVs used for off-highway recreation. The MIC has joined the U.S. Forest Service in its "Tread Lightly" campaign, an environmental awareness program aimed toward motorized recreationists.

Motorcycles in the 1990's are cleaner in terms of air pollutants than motorcycles in the past. National exhaust emission controls for new motorcycles began in 1978. Although motorcycles contributed less than 1 percent of the total hydrocarbon emissions nationwide before controls, the motorcycle industry supported the adoption of uniform national standards to regulate exhaust emissions.

The motorcycle industry's continuing commitment to reduce sound levels in our environment has been demonstrated by the production of quiet motorcycles and aftermarket exhaust systems. Many new models are as quiet as new automobiles. With the support of the industry, the U.S. Environmental Protection Agency set uniform national noise standards for new motorcycles and mopeds produced after 1981. MIC actively assists noise enforcement authorities in cost-efficient programs for motorcycle noise control.

The information in this publication has been gathered to provide a comprehensive source of motorcycle statistics. We welcome your comments for future editions.

The Motorcycle Industry Council is a nonprofit, national trade association of over 90 members, representing manufacturers and distributors of motorcycles, all-terrain vehicles, scooters, parts and accessories and members of allied trades. While the MIC name was founded in 1969, the association has existed under other names since 1914. In addition to the Irvine, California office, the MIC maintains a Government Relations office in the Washington D.C. area.

The MIC provides assistance and information to our members, the motorcycle industry in general, government officials and the public. The staff takes positive action on legislative and public issues affecting the interests of our industry. Through membership dues, the MIC supports activities in Government and Public Awareness, Statistics, Land Use, and Technical and Aftermarket programs.

Other publications and materials available through the MIC include:

- **Information Kit on Helmet Effectiveness, 1989**
- **Off-Highway Motorcycle and All-Terrain Vehicle Stationary Sound Test Manual, 1990**
- **Publications for Off-Highway Vehicle Land Management and Planning**
- **"Volunteer Trail Riders in the National Forests," Video Tape Presentation**
- **"Motorcycle Noise — Off-Highway Enforcement," 35mm Slide Presentation**
- **Federal Equipment Standards for Motorcycles Summary Booklet, 1989**
- **Federal Motor Vehicle Safety Standards for Motorcycles**
- **State On-Highway Motorcycle Equipment Requirements Chart**
- **State Off-Highway Motorcycle Requirements Chart**
- **Discover Today's Motorcycling "Straight Facts" informational brochures on How to Buy, How to Ride, How to Insure, and How to Finance a Motorcycle**
- **Discover Today's Motorcycling Public Awareness Information Kit**

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August 1, 1990

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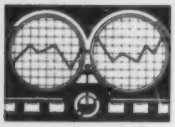
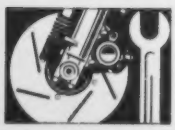
Contents



	Page
The Market Volume	**5-18**
U.S. Motorcycle Population by Model Type, Engine Displacement, Year	6
U.S. Motorcycle Population, Model Type by Engine Displacement	7
U.S. Motorcycle Population and Penetration by Region and State	8
Total Motorcycle Registrations by Year	9
Total Motorcycle Registrations by State	10
Economic Value of the Motorcycle Retail Marketplace by State	11
New Motorcycle Retail Sales by Model Type	12
U.S. Production, Import, Wholesale, New Registration Summary	13
U.S. Motorcycle Imports by Year, Country, Engine Displacement	14
New Motorcycle Wholesale Sales by Major Brands	15
New Motorcycle Registrations by State	16
New Motorcycle Registrations by Leading Brands	17
Motorcycle Scrappage and Operability Rate	18

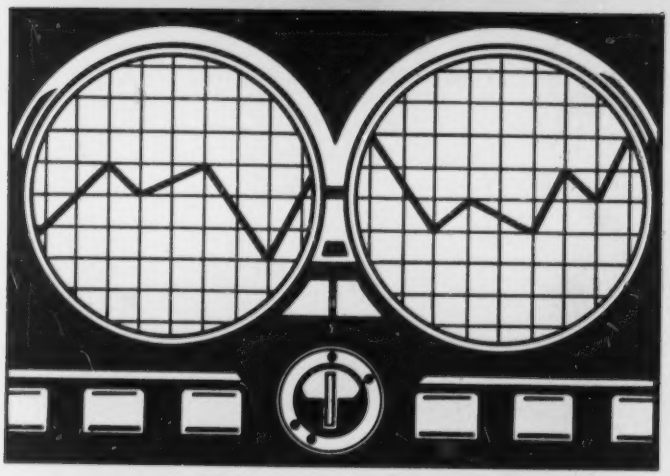


Manufacturers and Distributors	**19-22**
Profile of Major U.S. Motorcycle Manufacturers and Distributors	20
Other U.S. Motorcycle Manufacturers and Distributors	21-22

The Retail Marketplace	**23-26**
Motorcycle Retail Outlets, Employees, and Payroll	24
Motorcycle Outlet Retail Sales	25
Motorcycle Retail Outlet Profile	26

Motorcycle Usage	**27-40**
U.S. Motorcycle Usage On and Off-Highway by State	28
Public Land and Off-Highway Motorcycle Statistics by State	29
Miles Traveled, On and Off-Highway Mileage by Model Type	30
Miles Traveled by Model Type for On and Off-Highway	31
Average Annual Motorcycle Mileage	32
On-Highway Motorcycle Fuel Economy and Commuting	33
Motorcycle Rider Education Programs	34
State Motorcycle Rider Education Programs	35
State Motorcycle Operator Licensing Programs	36
State Motorcycle Operator Licensing Procedures	37
Motorcycle Accident Statistics by State	38
State Motorcycle Equipment Requirements	39
State Off-Highway Motorcycle Requirements	40

The Motorcycle Owner	**41-43**
Number of Owners, Sex, Marital Status, Age, Education	42
Owner Occupation, Income, Riding Experience, Motorcycle Ownership	43
Other National Motorcycle Organizations	**44**
State Motorcycle Dealers Associations	**45-46**
Index	**47**



The Market Volume

U.S. MOTORCYCLE POPULATION BY MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

In 1989 there were an estimated 6.56 million motorcycles, scooters and all-terrain vehicles (ATVs) in use in the United States, compared to an estimated 7.14 million in 1988.

Of the total population in 1989, 47.7% were *on-highway* motorcycles and scooters, 45.6% were *off-highway* motorcycles and ATVs, and 6.7% were *dual purpose* motorcycles. The on-highway and scooter segment, as well as the off-highway and ATV segment, increased slightly as a portion of the market in 1989 compared to 1988, while the dual purpose segment decreased.

Of all motorcycles, scooters and ATVs in use, it is estimated that just over half (59%) have an engine displacement less than 350 cubic centimeters. Over half (57%) of the estimated population were purchased new during the last five years.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

	1989		1988	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type*				
On-Highway	3,128,000	47.7%	3,385,000	47.4%
Off-Highway	2,987,000	45.6%	3,190,000	44.7%
Dual Purpose	440,000	6.7%	560,000	7.9%
	6,555,000	100.0%	7,135,000	100.0%
Engine Displacement				
Under 125 cc	1,296,000	19.8%	1,438,900	20.1%
125-349 cc	2,541,900	38.8%	2,743,500	38.5%
350-449 cc	428,500	6.5%	468,000	6.6%
450-749 cc	1,126,800	17.2%	1,223,900	17.2%
Over 749 cc	1,161,800	17.7%	1,260,700	17.6%
	6,555,000	100.0%	7,135,000	100.0%
Year Sold New				
1989	488,500	7.5%	—	—
1988	657,800	10.0%	688,200	9.7%
1987	851,900	13.0%	902,400	12.7%
1986	855,000	13.0%	939,700	13.2%
1985	883,600	13.5%	995,200	13.9%
1984	795,100	12.1%	915,600	12.8%
1983	546,400	8.3%	677,500	9.5%
1982	333,300	5.1%	445,700	6.2%
1981	278,700	4.3%	397,400	5.6%
1980	205,200	3.1%	280,300	3.9%
1979	143,300	2.2%	207,500	2.9%
1978	86,300	1.3%	128,300	1.8%
Prior to 1978	429,900	6.6%	557,200	7.8%
	6,555,000	100.0%	7,135,000	100.0%

NOTE: The 1984 - 1989 estimates are comparable only to the 1980 and revised 1979 estimates.

*** Model Type Definition:**

On-Highway: Motorcycles certified by the manufacturer as being in compliance with the Federal Motor Vehicle Safety Standards (FMVSS), and designed for use on public roads. *Includes scooters (513,000 in 1989 and 510,000 in 1988).* *Excludes mopeds and nopeds* (limited speed motor-driven cycles under 50 cc, without fully operative pedals).

Off-Highway: Motorcycles and all-terrain vehicles (ATVs) not certified by the manufacturer to be in compliance with FMVSS. *Includes three and four-wheeled ATVs (2,393,000 in 1989 and 2,517,000 in 1988).*

Dual Purpose: Motorcycles certified by the manufacturer as being in compliance with FMVSS, and designed with the capability for use on public roads, as well as off-highway recreational use.

Source: 1988 and 1989 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.

U.S. MOTORCYCLE POPULATION, MODEL TYPE BY ENGINE DISPLACEMENT

On-highway motorcycles tend to have relatively large engines. In 1989, over two-thirds (68%) of the on-highway motorcycles in use had an engine displacement over 449 cc's.

The off-highway segment, including competition motorcycles and all-terrain vehicles (ATVs), is dominated by relatively small engines. In 1989 nearly all (90%) of the off-highway motorcycles and ATVs in use had an engine displacement less than 350 cc's.

Dual purpose motorcycles also tend to have relatively small engines. Over three-fourths (77%) of the dual purpose motorcycles in use in 1989 had an engine displacement less than 350 cc's.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE BY ENGINE DISPLACEMENT

	1989		1988	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type				
On-Highway	3,128,000	100.0%	3,385,000	100.0%
Under 125 cc	511,000	16.3%	507,700	15.0%
125-349 cc	310,700	9.9%	331,400	9.8%
350-449 cc	165,300	5.3%	220,400	6.5%
450-749 cc	979,200	31.3%	1,064,800	31.5%
Over 749 cc	1,161,800	37.2%	1,260,700	37.2%
Off-Highway	2,987,000	100.0%	3,190,000	100.0%
Under 125 cc	654,200	21.9%	752,200	23.6%
125-349 cc	2,022,100	67.7%	2,144,600	67.2%
350-449 cc	236,000	7.9%	215,500	6.8%
450-749 cc	74,700	2.5%	77,700	2.4%
Over 749 cc	0	0.0%	0	0.0%
Dual Purpose	440,000	100.0%	560,000	100.0%
Under 125 cc	130,800	29.7%	179,000	32.0%
125-349 cc	209,100	47.5%	267,500	47.8%
350-449 cc	27,200	6.2%	32,100	5.7%
450-749 cc	72,900	16.6%	81,400	14.5%
Over 749 cc	0	0.0%	0	0.0%

NOTE: The 1984 - 1989 estimates are comparable only to the 1980 and revised 1979 estimates.

On-highway includes scooters (513,000 in 1989 and 510,000 in 1988). Excludes mopeds and nopeds.
Off-highway includes three and four-wheeled all-terrain vehicles (2,393,000 in 1989 and 2,517,000 in 1988).
See page 6 for model type definitions.

Source: 1989 and 1988 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.

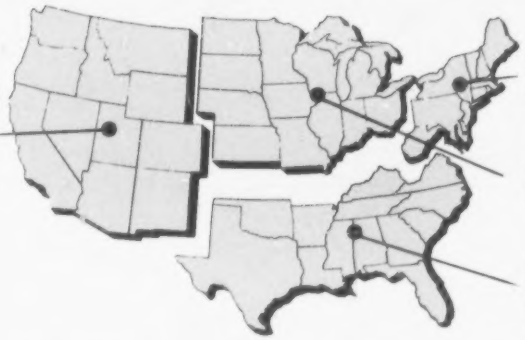
U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION AND STATE

On a regional basis the greatest number of motorcycles, scooters and ATVs in use in 1989 were in the South and the Midwest. Although the West ranked third in motorcycle, scooter and ATV population, California was, by far, the nation's leading state, where one in every eight (13%) of the nation's motorcycles, scooters and ATVs were owned.

In 1989 there were an estimated 2.7 motorcycles, scooters and ATVs owned by every 100 persons living in the United States. Regionally, penetration was highest in the West where 3.2 vehicles were owned for every 100 residents, and lowest in the East where 2.1 vehicles were owned for every 100 residents.

Nearly one third (32%) of the nation's motorcycle, scooter and ATV population was owned in the five leading states; California, Texas, New York, Michigan, and Florida.

1989 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION



WEST
1,599,200 motorcycles, scooters & ATVs
3.2 vehicles per 100 persons
(Alaska and Hawaii included in West)

EAST
1,199,100 motorcycles, scooters & ATVs
2.1 vehicles per 100 persons

MIDWEST
1,693,800 motorcycles, scooters & ATVs
2.8 vehicles per 100 persons

SOUTH
2,062,900 motorcycles, scooters & ATVs
2.7 vehicles per 100 persons

1989 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY STATE

State	Motorcycle Population	Motorcycle Population by Model Type			Motorcycle Penetration
		On-Hwy.	Off-Hwy.	Dual Purpose	Per 100 Population
Alabama	140,700	47,800	82,800	10,100	3.4
Alaska	36,200	5,600	28,100	2,500	6.9
Arizona	104,400	44,400	52,000	8,000	3.0
Arkansas	129,100	33,700	87,900	7,500	5.4
California	832,300	447,300	317,500	67,500	2.9
Colorado	92,300	43,500	38,100	10,700	2.8
Connecticut	72,100	44,100	24,400	3,600	2.2
Delaware	13,400	6,300	6,600	500	2.0
D.C.	1,800	1,800	0	0	0.3
Florida	273,300	151,500	101,500	20,300	2.2
Georgia	200,700	82,800	106,200	11,700	3.2
Hawaii	Not Available				
Idaho	53,400	13,900	29,900	9,600	5.3
Illinois	228,600	150,400	65,400	12,800	2.0
Indiana	175,600	101,500	66,500	7,600	3.2
Iowa	110,700	73,800	31,500	5,400	3.9
Kansas	64,200	35,600	23,700	4,900	2.6
Kentucky	88,600	32,400	51,200	5,000	2.4
Louisiana	121,700	37,800	78,300	5,600	2.8
Maine	52,000	24,600	24,600	2,800	4.3
Maryland	83,200	45,000	32,800	5,400	1.8
Mass.	112,900	67,600	41,000	4,300	1.9
Michigan	294,700	136,200	146,900	11,600	3.2
Minnesota	152,500	76,900	67,500	8,100	3.5
Mississippi	79,200	21,000	54,300	3,900	3.0
Missouri	133,600	47,000	80,300	6,300	2.6

State	Motorcycle Population	Motorcycle Population by Model Type			Motorcycle Penetration
		On-Hwy.	Off-Hwy.	Dual Purpose	Per 100 Population
Montana	37,600	9,800	21,800	6,000	4.7
Nebraska	50,000	20,600	25,700	3,700	3.1
Nevada	39,900	17,600	19,100	3,200	3.8
N.H.	55,800	30,200	23,200	2,400	5.1
New Jersey	125,800	66,000	52,800	7,000	1.6
New Mexico	45,700	19,800	20,200	5,700	3.0
New York	299,700	168,000	116,200	15,500	1.7
N.C.	158,800	58,300	92,100	8,400	2.4
N.D.	25,300	11,300	11,200	2,800	3.8
Ohio	264,600	143,000	111,400	10,200	2.4
Oklahoma	90,400	36,800	41,600	12,000	2.8
Oregon	108,700	41,200	58,100	9,400	3.9
Penn.	268,100	115,000	137,400	15,700	2.2
R.I.	21,400	15,700	4,800	900	2.2
S.C.	66,900	31,300	31,900	3,700	1.9
S.D.	26,900	12,600	11,700	2,600	3.8
Tennessee	156,900	51,700	94,500	10,700	3.2
Texas	423,000	219,400	173,900	29,700	2.5
Utah	80,500	22,300	46,500	11,700	4.8
Vermont	20,300	8,300	11,000	1,000	3.6
Virginia	133,600	63,500	60,200	9,900	2.2
Washington	145,800	70,000	61,500	14,300	3.1
W. Virginia	72,600	16,100	51,200	5,300	3.9
Wisconsin	167,100	100,700	56,900	9,500	3.4
Wyoming	22,400	6,300	13,100	3,000	4.7
U.S. Total	6,555,000	3,128,000	2,987,000	440,000	2.7

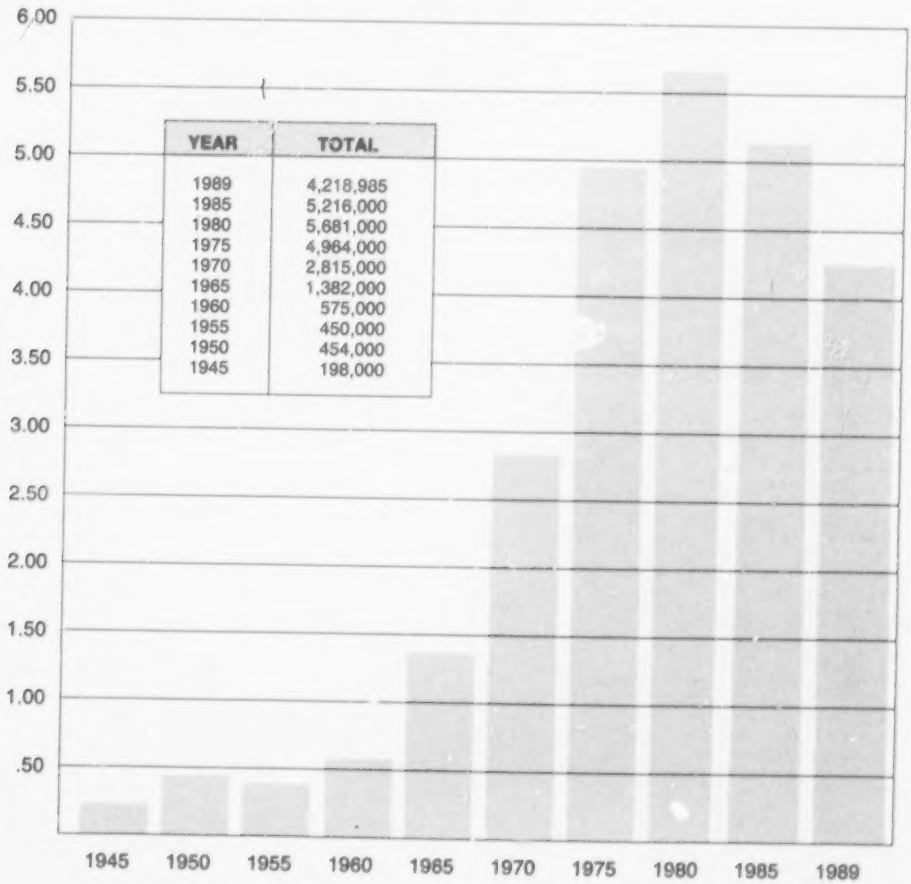
Note: Includes scooters and ATVs, and excludes mopeds and nopeds. See page 6 for model type definitions.
The 1984 - 1989 state estimates are comparable only to the 1980 and revised 1979 estimates.

Source: 1989 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.
Estimates of the Resident Population of States, July 1, 1989, U.S. Department of Commerce, Bureau of the Census.

TOTAL MOTORCYCLE REGISTRATIONS BY YEAR

Of the 6.6 million motorcycles, scooters, and ATVs in use in the United States, an estimated 4.2 million, or 64%, were registered for use on public roads in 1989. In order to be registered for use on public roads, motorcycles must be in compliance with the Federal Motor Vehicle Safety Standards and the state motorcycle equipment requirements. The equipment requirements for street registered motorcycles are summarized on page 39. Some states include the titling of off-highway motorcycles and ATVs in their motorcycle registration totals.

U.S. TOTAL MOTORCYCLE REGISTRATIONS, 1945-1989



YEAR	TOTAL
1989	4,218,985
1985	5,216,000
1980	5,681,000
1975	4,964,000
1970	2,815,000
1965	1,382,000
1960	575,000
1955	450,000
1950	454,000
1945	198,000

Source: U.S. Department of Transportation, Federal Highway Administration for 1945-1975 motorcycle registrations.
Motorcycle Safety Foundation, Irvine, California for 1980 and subsequent year motorcycle registrations.

TOTAL MOTORCYCLE REGISTRATIONS BY STATE

In 1989 motorcycle registrations accounted for 2.2% of all motor vehicles registered for use on public roads in the United States.

Regionally, the greatest portion of the nation's motorcycle registrations (32%) occurred in the Midwest. The West (28%) was second in motorcycle registrations, followed by the South (22%). The East (18%) reported the smallest portion of U.S. motorcycle registrations.

The five leading states, California, Ohio, Illinois, Florida and New York, accounted for over one third of the 4.2 million motorcycles registered in 1989.

U.S. TOTAL MOTORCYCLE REGISTRATIONS BY STATE, 1980-1989

State	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Alabama	73,978	75,220	70,960	71,333	71,502	66,176	62,562	56,752	52,715	46,460
Alaska	10,651*	8,888	10,897*	15,087	15,094	14,432	14,103	13,273	12,461	11,801
Arizona	81,846	86,216	84,776	76,716	84,093*	78,430	78,233	76,741	76,091	73,576
Arkansas	34,106	30,388	25,938	23,768	28,119	28,844	28,844	20,048	16,586	15,122
California	737,774	731,310	645,000	695,813	695,251	702,782	699,239	647,488	664,819	643,137
Colorado	115,500*	121,510*	119,079	120,000*	120,000*	110,562	107,660	107,000*	115,629	112,244
Connecticut	77,456	80,470	79,932	80,317	79,854	61,242	60,964	63,613	59,331	55,914
Delaware	8,261	8,348	8,216	8,538	8,573*	8,360	8,124	7,455	7,768	7,774
Dist. of Col.	5,339	5,768	5,896	5,514*	5,599*	3,385	2,758	2,478	1,911	2,800*
Florida	197,541	225,441	221,571	224,965	221,339	239,840	216,025*	234,498	203,913*	195,293
Georgia	118,453	112,517	110,795*	110,795*	114,234	89,556	84,543	79,887	75,341	70,271
Hawaii	9,696	10,700	11,317	8,563	10,199	10,607	11,055	12,065	11,544	12,159
Idaho	56,287	55,975	53,302	52,124	50,595	47,854	47,019	41,712	38,282	36,108
Illinois	289,436	305,727	285,188	295,655	309,807*	241,105	250,829	242,000*	243,789	224,062
Indiana	179,741	172,574	160,071	138,916	135,729	133,232	135,729	104,578	99,745	96,729
Iowa	219,221	233,172	234,985	238,687	183,687	188,277	172,444	163,521	145,967	139,038
Kansas	92,218	140,677	106,566	83,587	83,744	78,739	73,890	69,532	64,724	61,419
Kentucky	62,057*	65,000	60,958	58,357	50,355	38,799	38,497	35,435	32,054	31,165
Louisiana	75,000*	75,000*	109,312	92,740	104,000	113,667	89,700	93,352	68,080	71,017
Maine	38,133	39,857	38,872	38,872	40,361	37,950	37,246	37,676	35,876	35,166
Maryland	74,250	80,289	78,829	74,406	71,761	70,500	74,891	58,188	51,358	51,613
Massachusetts	98,935*	100,369	108,410*	93,405	103,000	94,999	85,000	66,366	59,000*	58,984
Michigan	254,129	243,858	230,794	219,929	200,609	203,226	185,993	161,626	150,000*	142,061
Minnesota	157,815	166,151	159,345	155,502	153,851	151,449	141,261	134,590	128,956	123,308
Mississippi	22,059	29,273	29,068	28,198	26,116	25,653*	28,198	18,551	18,411	18,022
Missouri	118,284	142,488	117,787	109,154	111,106	98,766	78,533	98,766*	81,123	79,984
Montana	35,100*	35,470	45,702	32,761*	37,371*	35,119*	27,493	25,503	24,294	24,000*
Nebraska	52,149	50,371	47,887	47,172	46,532	42,548	33,077	31,770	29,088	23,560
Nevada	19,958	21,008	21,940	26,062	20,780	20,013	18,899	21,248	17,649	17,886
New Hampshire	44,815	43,462	49,196*	49,756*	35,543	36,421	36,007	29,463	30,410	32,741
New Jersey	102,425*	106,753*	114,112*	115,964*	115,303	95,500	116,602*	77,073	77,734	76,401
New Mexico	50,576	52,810	58,587	58,217	56,148	52,236	42,152	40,127	35,421	38,528
New York	208,727	160,619	157,792	163,740	174,911	216,688	214,893	207,524	201,265	192,738
North Carolina	114,615	110,156*	110,000	69,616	67,615	67,632	64,129	64,129	59,991	55,844
North Dakota	29,613	31,115	31,312	32,134	31,480	30,596	28,118	32,152	23,978	21,674
Ohio	285,600*	185,678*	277,143	290,799	280,297	277,487	304,128	258,243	243,885	244,003
Oklahoma	125,380	129,704	137,369*	127,800	105,963	104,457	68,093	67,802	64,056	60,863
Oregon	90,301	92,316	90,261	89,956	78,166	89,886	87,105	83,281	71,538	69,928
Pennsylvania	269,565	190,480*	227,752	208,925	207,170	201,069	190,345	183,130	174,790	167,201
Rhode Island	22,442*	23,789*	22,895	27,853	27,907	27,454	27,155	29,354	32,626	30,000*
South Carolina	38,875	42,257	35,028	36,130	37,119	37,119	36,074	34,220*	33,426	30,050
South Dakota	35,045	38,265	38,418	39,255	38,956	37,905	36,036	33,800	31,421	29,942
Tennessee	84,121	83,179	83,269	79,821	100,879	85,985*	114,071*	82,728	114,071*	80,591
Texas	310,000*	300,330	312,924*	334,681	306,578	277,551	248,715	225,997	206,497	187,687
Utah	63,153	66,653*	66,934*	64,758	67,603*	71,923*	53,000	45,435	28,900	27,063
Vermont	23,293	29,449*	21,812	21,347	25,724*	23,415	23,048	21,854	17,438	16,365
Virginia	80,518	87,951	80,515	79,039	81,825	83,920	79,037	72,183	66,327	64,000*
Washington	135,899	139,931	131,667	127,950	136,679*	125,224	122,751	124,215	112,228	108,082
West Virginia	39,518	37,580	37,680	31,789	33,432	32,270	31,992	27,067	26,511	24,505
Wisconsin	191,725	190,961	188,863	185,685	190,612	188,331	186,020	167,792	167,055	161,306
Wyoming	19,900*	20,763*	21,937	22,401	22,282	16,760	21,500	21,428	20,050	18,800
TOTAL	5,681,479	5,618,336	5,578,859	5,484,552	5,405,453	5,215,941	5,023,780	4,654,709	4,426,123	4,218,985

Note: See footnote on page 38 for types of vehicles included in 1989 state total motorcycle registrations. *Estimated

Source: Motorcycle Safety Foundation, Irvine, California.

ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

In 1989 the motorcycle industry generated an estimated $6.77 billion in consumer sales and services and state taxes and licensing, of which $1.87 billion, or 27.7%, is attributed to retail sales of new motorcycles, scooters, and ATVs.

In addition to this $6.77 billion generated by the retail marketplace, major contributions to the economic value of the industry in personnel salaries, product advertising, corporate and personal income taxes, etc., are made by the manufacturers and distributors of new motorcycles, scooters and ATVs, parts and accessories, and the trades allied to the industry.

1989 ESTIMATED ANNUAL ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

State	1989 Estimated Annual* Economic Value of the Retail Marketplace	1989 Estimated Retail Sales of New Motorcycles		State	1989 Estimated Annual* Economic Value of the Retail Marketplace	1989 Estimated Retail Sales of New Motorcycles	
	$000's	Units	$000's		$000's	Units	$000's
Alabama	$ 95,080	8,830	$ 28,240	Montana	$ 61,470	3,610	$ 12,540
Alaska	81,860	4,710	16,700	Nebraska	59,560	3,190	12,150
Arizona	93,870	7,160	27,880	Nevada	80,290	4,770	16,380
Arkansas	136,450	11,510	37,960	New Hampshire	93,330	4,220	19,040
California	886,840	74,150	274,920	New Jersey	143,810	10,680	43,290
Colorado	113,970	7,950	33,850	New Mexico	58,530	3,130	11,940
Connecticut	84,480	5,810	25,090	New York	301,480	21,600	85,620
Delaware	17,920	1,380	4,910	North Carolina	185,030	15,050	52,550
Dist. of Col.	620	140	170	North Dakota	21,900	1,490	6,000
Florida	265,500	22,010	75,430	Ohio	254,600	17,370	72,310
Georgia	151,200	13,860	45,510	Oklahoma	92,940	5,260	18,960
Hawaii	Not Avail.	Not Avail.	Not Avail.	Oregon	97,850	8,550	29,060
Idaho	63,580	4,160	12,970	Pennsylvania	282,980	21,210	80,370
Illinois	263,100	18,460	74,720	Rhode Island	25,070	1,630	6,870
Indiana	143,620	12,290	43,230	South Carolina	95,640	5,980	19,510
Iowa	86,940	6,610	25,820	South Dakota	28,910	1,930	7,920
Kansas	65,150	3,380	13,290	Tennessee	132,450	11,700	39,870
Kentucky	76,460	7,590	22,710	Texas	371,650	29,860	105,180
Louisiana	91,520	7,780	27,180	Utah	77,300	4,430	15,770
Maine	80,250	3,950	16,370	Vermont	26,570	1,850	7,280
Maryland	96,260	7,660	28,590	Virginia	120,040	8,730	33,370
Massachusetts	130,760	8,490	36,350	Washington	144,170	11,230	40,080
Michigan	278,560	21,910	79,140	West Virginia	88,580	5,260	18,070
Minnesota	186,830	12,620	53,060	Wisconsin	182,110	12,600	51,720
Mississippi	100,490	6,080	20,500	Wyoming	23,180	1,770	6,350
Missouri	130,250	9,410	36,210	U.S. Total	$6,771,000	505,000	$1,873,000

Note: The 1989 figures above are not comparable to prior year estimates due to retail sales and population revisions. See page 12 for updated retail sales estimates for prior years.

New motorcycle retail sales include all-terrain vehicles, scooters, and nopeds (limited speed motor-driven cycles under 50 cc which are not generally defined by state as mopeds). Excludes mopeds. New motorcycle retail sales dollars based on the manufacturers "suggested retail price" per model as published in the MIC Manufacturers Shipment Reporting System.

*The 1989 estimated annual economic value of the retail marketplace includes retail sales of motorcycles, scooters, and ATVs (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registration fees. Revenues from industry publications, corporate income taxes, personal income tax from non-dealer salaries, motorcycle and aftermarket manufacturer and distributor personnel salaries and advertising, and special events attendance are not included.

Source: "1989 Estimated Retail Sales of New Motorcycles" for each state was derived by the Motorcycle Industry Council from the MIC Manufacturers Shipment Reporting System, adjusted for retail sales. "1989 Estimated Annual Economic Value of the Motorcycle Retail Marketplace" was derived by the Motorcycle Industry Council from the percent of the annual industry economic value represented by the estimated retail sales dollars for new motorcycles in a sample of states.

NEW MOTORCYCLE RETAIL SALES BY MODEL TYPE

In 1989, estimated retail sales of new motorcycles, scooters, and ATVs were 505,000 units, valued at 1.9 billion dollars.

Off-highway motorcycles and ATVs totalled an estimated 270,000 units, or just over one half (53%) of the new retail sales units in 1989. An estimated 200,000 of these off-highway retail sales units were ATVs. Off-highway retail sales accounted for 0.8 billion dollars, or 43% of the total retail sales dollars.

New retail unit sales of on-highway motorcycles and scooters were 217,000 in 1989, or 43% of the total retail sales. On-highway retail sales accounted for 1.0 billion dollars, over half (54%) of the retail dollars in 1989. Dual purpose motorcycles represented 18,000 new unit sales and 44 million retail dollars in 1989.

ESTIMATED NEW RETAIL SALES BY MODEL TYPE, 1970-1989

Year	Total		On-Highway		Off-Highway		Dual Purpose	
	Units	Retail $	Units	Retail $	Units	Retail $	Units	Retail $
	(000's)	(000,000's)	(000's)	(000,000's)	(000's)	(000,000's)	(000's)	(000,000's)
1970	1,010	$ N/A	333	$ N/A	199	$ N/A	478	$ N/A
1971	1,240	N/A	472	N/A	226	N/A	542	N/A
1972	1,360	1,027	564	591	233	101	563	335
1973	1,520	1,250	655	719	292	161	573	370
1974	1,200	1,285	489	739	244	171	467	375
1975	940	1,209	451	819	247	188	242	202
1976	1,050	1,298	491	853	260	200	299	245
1977	1,080	1,487	568	1,015	283	287	229	185
1978	975	1,432	482	1,005	326	276	167	151
1979	1,085	1,752	606	1,277	332	321	147	154
1980	1,070	1,971	654	1,526	313	330	103	115
1981	1,065	2,160	614	1,621	370	446	81	93
1982	990	1,991	520	1,389	415	528	55	74
1983	1,185	2,353	550	1,468	580	811	55	74
1984	1,305	2,838	550	1,691	700	1,061	55	86
1985	1,260	2,787	520	1,508	695	1,207	45	72
1986	1,075	2,575	440	1,322	605	1,200	30	53
1987	970	2,553	438	1,348	505	1,152	27	53
1988	710	2,292	310	1,248	375	988	25	56
1989	505	1,873	217	1,015	270	814	18	44

Note: See page 6 for model type definitions.

On-Highway includes scooters and nopeds, and excludes mopeds. Estimated 1982-1989 scooter retail sales units and dollars are as follows:

1982 — 15,000 units, $ 17,100,000
1983 — 25,000 units, $ 19,700,000
1984 — 65,000 units, $ 55,325,000
1985 — 115,000 units, $ 89,100,000
1986 — 135,000 units, $141,300,000
1987 — 153,000 units, $129,681,000
1988 — 90,000 units, $ 94,923,000
1989 — 45,000 units, $ 56,160,000

Estimates prior to 1982 are not available.

Off-Highway includes three and four-wheeled ATVs and competition motorcycles. 1982-1989 estimated ATV retail unit and dollar sales are as follows:

1982 — 250,000 units, $321,000,000
1983 — 425,000 units, $599,675,000
1984 — 550,000 units, $848,650,000
1985 — 550,000 units, $989,450,000
1986 — 480,000 units, $990,240,000
1987 — 405,000 units, $959,445,000
1988 — 290,000 units, $796,630,000
1989 — 200,000 units, $639,000,000

Estimates prior to 1982 are not available.

Retail $ — The estimated retail dollar volume is based on the manufacturer's "suggested retail price" per model as published in the MIC Manufacturers Shipment Reporting System.

Source: Units — MIC estimate derived from motorcycle import, production, wholesale, inventory, and registration statistics.
Retail Dollars — Based on the manufacturer's "suggested retail price" as published in the MIC Manufacturers Shipment Reporting System.

U.S. PRODUCTION, IMPORT, WHOLESALE, AND NEW REGISTRATION SUMMARY

In 1989, an estimated 120,000 motorcycles and ATVs were manufactured in the U.S. 1989 motorcycle and scooter imports totalled 253,000 units, and ATV imports totalled an estimated 121,000 units. Wholesale sales of new motorcycles, scooters, and ATVs to dealers in 1989 were an estimated 418,000 units, valued at 1.2 billion dollars. New registrations of on-highway motorcycles, scooters, and some off-highway motorcycles and ATVs equalled 294,000 in 1989.

U.S. production, imports, wholesale sales, and new registrations are summarized below from 1970 to 1989, and in greater detail on the following pages.

U.S. PRODUCTION, IMPORT, WHOLESALE, AND NEW REGISTRATION SUMMARY, 1970-1989

Year	Estimated U.S. Production	U.S. Motorcycle Imports		Estimated U.S. ATV Imports	Estimated Wholesale Sales		New Registrations
	Units	Units	Dollars	Units	Units	Dollars	Units
	(000's)	(000's)	(000,000's)	(000's)	(000's)	(000,000's)	(000's)
1970	35	1,091	$ 308	N/A	1,040	$ 467	N/A
1971	25	1,539	495	N/A	1,340	670	928
1972	35	1,690	697	N/A	1,400	801	1,006
1973	45	1,206	570	N/A	1,580	960	1,190
1974	40	1,543	911	N/A	1,200	977	1,024
1975	40	948	711	N/A	910	900	747
1976	80	659	466	N/A	1,050	1,006	783
1977	110	860	588	N/A	1,100	1,140	849
1978	80	935	797	N/A	1,000	1,160	797
1979	120	887	870	N/A	1,090	1,405	886
1980	130	1,120	1,142	N/A	1,190	1,750	876
1981	125	1,057	1,314	N/A	1,155	1,890	828
1982	100	917	1,110	N/A	1,025	1,609	726
1983	100	540	697	N/A	1,260	2,015	811
1984	155	441	523	635	1,400	2,354	772
1985	130	733	783	683	1,290	2,281	722
1986	105	550	763	498	990	1,915	631
1987	125	318	463	320	865	1,850	550
1988	110	287	512	210	590	1,568	410
1989	120	253	542	121	418	1,204	294

Note: Production — Includes motorcycles, scooters, and three and four-wheeled ATVs if manufactured in the U.S.

Motorcycle Imports — Includes motorcycles, scooters, and nopeds; ATVs and mopeds not included. Dollar value equals dutiable value for 1970-1979 and C.I.F. value for 1980 and subsequent years.

ATV Imports — Includes three and four-wheeled ATVs. ATVs manufactured in the U.S. not included.

Wholesale Sales — Includes motorcycles, scooters, nopeds, and three and four-wheeled ATVs. The wholesale dollar volume is based on the lowest price at which the vehicle is sold to dealers f.o.b. point of U.S. manufacture or point of entry. This wholesale price does not consider dealer discounts, special promotional allowances, rebates, or other incentives.

New Registrations — Includes first-time registrations of motorcycles, scooters, nopeds, and some off-highway motorcycles and ATVs for the three most current model years. Oklahoma registrations first became available in 1987. Incomplete Ohio registrations estimated for 1974. 1978 and subsequent years include California off-highway registrations. New York registrations not available from October 1983-December 1984.

Source: Production — MIC estimate derived from R.L. Polk & Co. new motorcycle registrations and information offered by the U.S. distributors.
Imports — U.S. Dept. of Commerce and U.S. Motorcycle Imports and U.S. Moped, Motor Scooters, 3 & 4 Wheeler Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.
Wholesale Sales — MIC Manufacturers Shipment Reporting System for major distributors and MIC estimate for scooters and other brands.
New Registrations — New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L. Polk & Co.

U.S. MOTORCYCLE IMPORTS BY YEAR, COUNTRY, AND ENGINE DISPLACEMENT

In 1989, 253,000 motorcycles and scooters with a dutiable value of $542 million were imported into the United States. Of these units imported, 91.8% were from Japan, 2.3% from European countries, and 5.9% from other countries. In addition to these motorcycles and scooters, 11,600 mopeds or motorized bicycles were imported in 1989, primarily from European countries. All-terrain vehicles are not included.

The imports with relatively small engines, less than 191 cc displacement, represented 36% of the total units imported, but only 17% of the total dutiable dollar value. Imports with relatively large engines, over 490 cc displacement, represented 38% of the units imported and 59% of the total dutiable dollar volume in 1989.

U.S. MOTORCYCLE IMPORTS BY COUNTRY, 1983-1989

	1983	1984	1985	1986	1987	1988	1989
Japan							
Units	522,573	417,824	710,959	535,028	305,827	274,604	231,942
$ Value	$ 666,284,854	$ 482,238,238	$ 737,814,137	$ 724,051,178	$ 424,612,449	$ 468,969,686	$ 504,101,573
European Countries							
Units	13,597*	17,397*	21,178*	13,748*	11,077*	12,021*	5,901*
$ Value	$ 29,266,634	$ 38,296,805	$ 42,816,389	$ 38,261,208	$ 37,865,258	$ 42,437,399	$ 22,002,791
All Others							
Units	4,043*	6,199*	1,201*	893*	970*	282*	14,819*
$ Value	$ 1,633,326	$ 2,851,599	$ 2,455,798	$ 451,164	$ 681,460	$ 377,788	$ 16,022,667
Total							
Units	540,213*	441,420*	733,338*	549,669*	317,874*	286,907*	252,662*
$ Value	$ 697,184,814	$ 523,386,642	$ 783,086,324	$ 762,763,550	$ 463,159,167	$ 511,784,873	$ 542,127,031

SCOOTERS INCLUDED; ATVs EXCLUDED. Dollar Value = C.I.F. Value.

U.S. MOTORCYCLE IMPORTS BY ENGINE DISPLACEMENT, 1983-1989

	1983	1984	1985	1986	1987	1988	1989
Under 191 cc							
Units	175,212*	191,856*	355,670*	241,250*	156,485*	133,828*	90,156*
$ Value	$ 94,634,569	$ 97,761,171	$ 176,053,176	$ 152,153,709	$ 109,835,387	$ 107,923,087	$ 90,213,779
191-490 cc							
Units	75,321	67,792	164,493	148,941	68,530	64,511	62,422
$ Value	$ 82,609,575	$ 78,049,993	$ 183,019,603	$ 218,738,761	$ 105,170,653	$ 130,736,424	$ 131,691,173
491-790 cc							
Units	215,975	141,716	177,605	129,932	70,841	67,101	65,902
$ Value	$ 362,771,480	$ 256,491,632	$ 329,283,894	$ 291,693,936	$ 171,185,050	$ 189,330,629	$ 183,957,001
Over 790 cc							
Units	65,093	34,828	31,274	28,702	20,694	18,394	31,329
$ Value	$ 153,545,173	$ 88,441,983	$ 91,724,205	$ 99,838,528	$ 75,631,655	$ 82,913,454	$ 134,978,446
Unspecified							
Units	8,612	5,228	4,296	844	1,324	3,073	2,853
$ Value	$ 3,624,017	$ 2,641,863	$ 3,005,446	$ 338,616	$ 1,336,422	$ 881,279	$ 1,286,632
Total							
Units	540,213*	441,420*	733,338*	549,669*	317,874*	286,907*	252,662*
$ Value	$ 697,184,814	$ 523,386,642	$ 783,086,324	$ 762,763,550	$ 463,159,167	$ 511,784,873	$ 542,127,031

SCOOTERS INCLUDED; ATVs EXCLUDED

Dollar Value = C.I.F. Value.

*Excludes estimated imports of mopeds (motorized bicycles) as follows:

1983- 21,645 units, $ 5,471,009
1984- 32,889 units, $ 8,900,146
1985- 30,174 units, $ 8,981,153
1986- 22,557 units, $ 6,984,588
1987- 23,683 units, $ 7,258,696
1988- 9,628 units, $ 3,358,684
1989- 11,587 units, $ 3,921,878

Source: U.S. Dept. of Commerce, Domestic and International Business Administration.
U.S. Motorcycle Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS

In 1989 estimated wholesale sales of new motorcycles and all-terrain vehicles (ATVs) to dealers by the five leading brands (Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha) in the United States were 353,758 units, valued at a wholesale dollar volume of $1.12 billion and an estimated retail dollar volume of $1.37 billion.

Of the total units wholesaled in 1989, 36.3% were on-highway motorcycles, 58.9% were off-highway motorcycles and ATVs, and the remaining 4.8% were dual purpose motorcycles. Over three fourths (76.5%) of the new motorcycles and ATVs shipped to dealers in 1989 had four-cycle engines, and over one half (57%) had an engine displacement less than 350 cubic centimeters. The five leading states in wholesale unit sales (California, Texas, Pennsylvania, New York, and Michigan) accounted for one third (33%) of the total U.S. wholesale sales in 1989.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS, 1985-1989

			Units										
				Model Type			Engine Type		Displacement Size (cc)				
	Wholesale $ Volume	Est. Retail $ Volume	Total Units	On-Highway	Off-Highway	Dual Purpose	Two-Stroke	Four-Stroke	Under 125 cc	125-349 cc	350-449 cc	450-749 cc	750 cc & Up
	($000's)	($000's)											
1985	$2,190,187	$2,708,401	1,166,220	388,488	740,304	37,428	192,017	974,203	228,094	530,326	77,630	178,056	152,114
(% of Total Units)			(100.0%)	(33.3%)	(63.5%)	(3.2%)	(16.5%)	(83.5%)	(19.6%)	(45.5%)	(6.6%)	(15.3%)	(13.0%)
1986	$1,790,247	$2,206,015	853,426	273,148	555,419	24,859	142,586	710,840	136,176	383,572	77,269	153,533	102,876
(% of Total Units)			(100.0%)	(32.0%)	(65.1%)	(2.9%)	(16.7%)	(83.3%)	(15.9%)	(44.9%)	(9.1%)	(18.0%)	(12.1%)
1987	$1,728,223	$2,125,598	728,042	237,200	465,051	25,791	141,577	586,465	116,774	332,303	60,094	117,409	101,462
(% of Total Units)			(100.0%)	(32.6%)	(63.9%)	(3.5%)	(19.4%)	(80.6%)	(16.0%)	(45.7%)	(8.3%)	(16.1%)	(13.9%)
1988	$1,445,607	$1,769,990	483,005	198,342	257,658	27,005	104,825	378,180	69,240	194,218	38,265	78,609	102,673
(% of Total Units)			(100%)	(41.1%)	(53.3%)	(5.6%)	(21.7%)	(78.3%)	(14.3%)	(40.2%)	(7.9%)	(16.3%)	(21.3%)
1989	$1,123,558	$1,373,090	353,758	128,293	208,340	17,125	83,218	270,540	46,921	154,432	28,558	54,111	69,736
(% of Total Units)			(100%)	(36.3%)	(58.9%)	(4.8%)	(23.5%)	(76.5%)	(13.3%)	(43.6%)	(8.1%)	(15.3%)	(19.7%)

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS IN TEN LEADING STATES, 1985-89

State	1989 Rank	1989 Units	1988 Rank	1988 Units	1987 Rank	1987 Units	1986 Rank	1986 Units	1985 Rank	1985 Units
California	1	51,051	1	61,327	1	88,328	1	102,749	1	131,896
Texas	2	20,169	2	29,768	3	34,433	2	42,237	2	76,864
Pennsylvania	3	15,782	4	21,642	4	33,217	5	40,297	3	54,885
New York	4	15,044	3	21,857	6	30,814	4	41,079	4	53,875
Michigan	5	14,295	5	20,733	2	36,733	3	41,944	5	53,058
Florida	6	13,477	6	17,971	7	28,994	7	31,994	7	43,580
Ohio	7	12,563	7	17,666	5	31,165	6	40,184	6	49,213
Illinois	8	11,924	9	14,958	10	23,052	10	25,859	10	35,298
North Carolina	9	11,246	10	14,271	9	23,489	9	27,113	9	35,526
Georgia	10	10,127	8	16,329	8	24,176	8	28,534	8	37,032

NOTE: Includes all-terrain vehicles and nopeds (limited speed, motor-driven cycles under 50 cc's without fully operative pedals). **Excludes mopeds and scooters.** See page 6 for model type definitions.

Source: Manufacturers Shipment Reporting System, Annual Statistical Report, Motorcycle Industry Council, Inc., Irvine, California. Includes wholesale shipments to dealers by Harley-Davidson, Honda, Kawasaki, Suzuki and Yamaha.

NEW MOTORCYCLE REGISTRATIONS BY STATE

In 1989, first-time registrations of new motorcycles, scooters and ATVs for the three most current model years were 293,726, or 58%, of the estimated 505,000 retail sales. New registrations are usually issued only to street legal motorcycles. A number of states, however, issue registrations for titling purposes for off-highway motorcycles and ATVs. In 1989, new registrations of off-highway motorcycles and ATVs represented 36% of all new registrations.

New York new registrations were unavailable for 1984. Oklahoma new registrations first became available in 1987.

NEW MOTORCYCLE REGISTRATIONS BY STATE, 1984-1989

	1984	1985	1986	1987	1988	1989
Total U.S.	772,166	721,975	630,739	550,494	409,734	293,726
State						
Alabama	26,528*	21,907*	19,261*	19,489*	10,520*	5,454*
Alaska	1,917*	1,405*	1,168*	943*	1,053*	908*
Arizona	8,568	10,862*	18,351*	12,413*	7,225*	5,515*
Arkansas	11,775*	8,304*	5,576*	4,695*	4,630*	3,886*
California	154,367*	151,432*	132,423*	111,008*	75,289*	57,055*
Colorado	8,948	6,234	5,258	4,819	3,822	3,135
Connecticut	7,709	6,136	6,183	6,064	4,472	3,309
Delaware	971	912	966	801	847	667
Dist. of Columbia	776	817	476	376	338	185
Florida	41,488*	21,173	17,955	19,536	12,710	9,884
Georgia	25,946*	30,480*	26,967*	15,755*	5,185	3,504
Hawaii	922	1,149	1,283	1,297	1,497	1,289
Idaho	4,741	3,164	2,012	1,740	1,213	1,089
Illinois	38,390*	35,617*	31,333*	31,010*	21,643*	14,754*
Indiana	13,181	11,052	9,000	8,443	6,335	4,502
Iowa	16,181	9,374	6,807	6,341	4,724	3,337
Kansas	8,063	6,582	5,227	4,342	2,810	2,334
Kentucky	4,548	4,901	4,674	3,898	2,839*	2,028*
Louisiana	23,097*	18,258*	14,731*	11,212*	8,242*	5,570*
Maine	3,364	2,318	2,568	2,680	2,077	1,184
Maryland	9,359	9,622	8,203*	8,343*	6,882*	5,122*
Massachusetts	10,365	9,542	9,591	8,780	7,730	5,396
Michigan	22,323	17,037	24,685*	10,829	24,683*	18,193*
Minnesota	15,388	8,657	6,449	7,443	5,974	4,068
Mississippi	10,996*	10,872*	9,403*	8,107*	5,918*	4,346*
Missouri	18,957*	18,313*	14,311*	5,471	15,364*	7,454*
Montana	2,432	1,622	1,193	1,013	902	896*
Nebraska	4,576*	3,403*	2,484*	2,024	1,073	638
Nevada	2,431	1,820	1,578	1,666	1,459	1,178
New Hampshire	4,142	3,607	3,709	3,961	3,590	2,392
New Jersey	10,459	9,662	8,895	7,789	6,396	5,473
New Mexico	8,663*	8,145*	6,302*	4,676*	3,189*	2,569*
New York	N/A	29,978	24,440	38,530*	21,169*	14,327*
North Carolina	10,529	8,495	7,660	6,993	5,125	4,155
North Dakota	2,642	2,165*	1,850*	1,452*	921*	767*
Ohio	26,879	19,916	16,503	15,069	10,941	7,755
Oklahoma	N/A	N/A	N/A	3,576	2,606	2,103
Oregon	18,514*	18,786*	16,460*	14,117*	8,771*	5,670*
Pennsylvania	26,911*	25,427*	19,669*	14,662	11,440	9,038
Rhode Island	2,752	2,638	2,246	2,237	1,520	1,062
South Carolina	10,611*	7,907*	6,025*	6,005*	5,204*	3,879*
South Dakota	2,366*	2,814*	2,274*	1,836*	1,485*	1,140*
Tennessee	13,085*	14,098*	11,749*	12,296*	10,935*	7,116*
Texas	60,544*	53,567	47,537*	37,264*	28,242*	19,847*
Utah	6,710	18,009*	10,742*	8,033*	4,569*	3,567*
Vermont	2,252*	2,764*	1,850*	2,136*	1,282*	1,322*
Virginia	11,908	10,452	9,025	7,692	5,742	4,108
Washington	27,451*	25,029*	21,452*	19,975*	13,004*	8,994*
West Virginia	7,534*	8,826*	7,655*	6,334*	5,765*	4,156*
Wisconsin	17,734	14,569	12,905	13,796	9,258	6,535
Wyoming	2,173	2,156*	1,675*	1,527*	1,124*	871*

* New registrations in these states include an unusually high percentage (20%-70%) of off-highway motorcycles and all-terrain vehicles.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L.Polk & Co.

NEW MOTORCYCLE REGISTRATIONS BY LEADING BRANDS

The nation's six major brands accounted for 99.4% of the new registrations in 1989. Honda, the leading brand during the past two decades, ranked first in 1989 with 28.9% of the registered market, followed by Yamaha with 25.7%, Kawasaki with 15.7%, and Suzuki with 14.2%. Harley-Davidson ranked fifth in 1989 with 14.0% of the new motorcycle registrations, and BMW ranked sixth with 0.9%. The market share for each of the remaining motorcycle brands distributed in the United States was reported to be less than 0.5% in 1989.

Although registrations are usually issued only to street legal motorcycles, some states issue registrations for off-highway motorcycles and ATVs for titling purposes.

NEW MOTORCYCLE REGISTRATIONS LEADING BRANDS BY MARKET SHARE, 1984-1989

Make	1989		1988		1987		1986		1985		1984	
	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share
Honda	1	28.9%	1	39.0%	1	50.8%	1	55.0%	1	58.5%	1	57.7%
Yamaha	2	25.7%	2	23.0%	2	19.8%	2	17.8%	2	15.7%	2	18.6%
Kawasaki	3	15.7%	3	13.9%	4	10.2%	4	9.7%	3	10.4%	4	8.9%
Suzuki	4	14.2%	4	13.3%	3	11.6%	3	11.1%	4	10.0%	3	10.0%
Harley-Davidson	5	14.0%	5	9.4%	5	6.3%	5	5.0%	5	4.1%	5	3.7%
BMW	6	0.9%	6	0.8%	6	0.7%	6	0.9%	6	0.8%	6	0.6%

Note: The market share for other brands was less than 0.5%.

R.L. Polk new registrations include the three most current model years. Some off-highway motorcycle and all-terrain vehicle new registrations are included.

New York new registrations were not available in 1984.

Oklahoma new registrations first became available in 1987.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L. Polk & Co.

MOTORCYCLE SCRAPPAGE AND OPERABILITY RATE

The number of motorcycles, scooters, and ATVs retired from use, or scrapped, in 1989 was an estimated 1.07 million or 15% of the 1988 population in use.

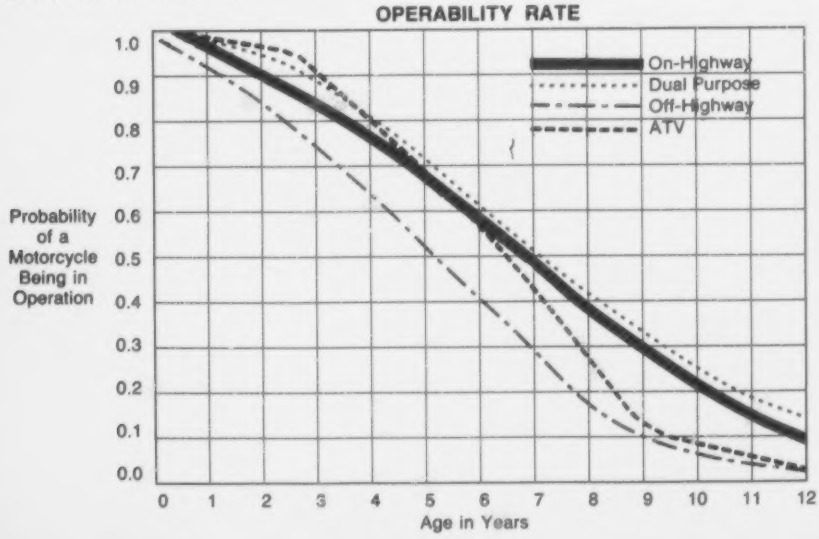
A key factor in determining average annual mileage is the motorcycle operability rate (the probability of a motorcycle being operable after a given number of years) because of the decrease in annual mileage as the vehicle ages. The operability rate for on-highway and dual purpose motorcycles tends to be higher than the rate for off-highway motorcycles.

MOTORCYCLES RETIRED FROM USE OR SCRAPPED IN 1989

Year Sold New	Est. Retail Sales (000's)	Operability Rate '88	Operability Rate '89	Estimated Population In Use (000's) '88	Estimated Population In Use (000's) '89	Estimated Number Retired From Use or Scrapped In 1989 (000's)
1989	497		.984		489	—
1988	700	.983	.940	688	658	30
1987	960	.940	.888	902	852	50
1986	1,057	.889	.809	940	855	85
1985	1,230	.809	.719	995	884	111
1984	1,275	.718	.624	916	795	121
1983	1,095	.619	.499	678	546	132
1982	900	.496	.370	446	333	113
1981	999	.397	.279	397	279	118
1980	977	.287	.210	280	205	75
1979	1,007	.207	.142	208	143	65
1978	921	.139	.093	128	86	42
Before 1978				557	430	127
				7,135	6,555	1,069 — 15.0% of 1988 Population

Note: The operability rates shown above are composites of the operability rates by model type and will vary each year according to the motorcycle population by model type. Mopeds and nopeds are excluded from retail sales estimates. Includes ATVs and scooters.

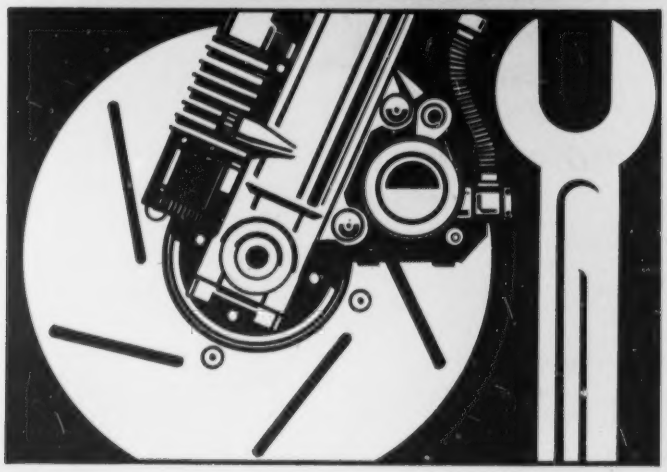
OPERABILITY RATE



OPERABILITY RATE

Age	On-Hwy.	Dual Purpose	Off-Hwy.	ATV
0.5	.98	.99	.97	.99
1.5	.92	.96	.90	.97
2.5	.86	.93	.82	.93
3.5	.79	.87	.70	.85
4.5	.72	.76	.58	.75
5.5	.64	.65	.46	.65
6.5	.55	.57	.32	.50
7.5	.45	.47	.16	.35
8.5	.35	.37	.10	.20
9.5	.27	.30	.05	.10
10.5	.19	.23	.02	.05
11.5	.13	.16	.01	.02

Source: 1988 and 1989 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.
Motorcycle Survival Rate Model, an analysis of the data from the 1980 Survey of Motorcycle Ownership and Usage, updated with data from the 1985 Survey of Motorcycle Ownership and Usage, Burke Marketing Research, Inc., Cincinnati, Ohio.



Manufacturers and Distributors

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS AND DISTRIBUTORS

In 1989 the six leading brands distributed in the United States, BMW, Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha, accounted for roughly 99% of the nation's estimated 505,000 new motorcycle, scooter, and ATV retail sales.

Four of the six major brands are manufactured primarily in Japan and have been distributing motorcycles in the U.S. for twenty to thirty years. Harley-Davidson and BMW, the fifth and sixth ranking brands, have been distributing motorcycles in the U.S. for eighty and forty years, respectively. Besides motorcycles, scooters, and ATVs, the six leading U.S. distributors also sell a wide range of other products in the U.S., including automobiles, snowmobiles, golf carts, go carts, power products, and watercraft.

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

Brand	U.S. Motorcycle Distributor	Motorcycle Manufacturer	Year of U.S. Incorporation	Other Products Sold in U.S.
BMW	BMW of North America, Inc. 300 Chestnut Ridge Road Woodcliff Lake, NJ 07675 (201) 307-4000	BMW Motorrad GmbH & Co. Triebstrasse 32 8000 Munich 50 West Germany	1976	Automobiles
Harley-Davidson	Harley-Davidson Motor Co., Inc 3700 W. Juneau Avenue P.O. Box 653 Milwaukee, WI 53201 (414) 342-4680	Same as distributor	1907	Motorcycle accessories, recreational and specialized vehicles and related products.
Honda	American Honda Motor Company, Inc. 100 West Alondra Blvd. Gardena, CA 90247 (213) 327-8280	Honda Motor Co., Ltd. No. 1-1, 2 Chome, Minami Aoyama Minato-Ku, Tokyo 107, Japan Honda of America Mfg. Inc. 24000 U.S. Route 33 Marysville, Ohio 43040 (Engine Manufacturing Facility) 12500 Meranda Road Ana, Ohio 45302	1959	Automobiles, all-terrain vehicles, motor scooters, accessories for motorcycles and products above, power products (generators, rototillers, outboards, lawnmowers, riding lawnmowers, lawn tractors, snow throwers, water pumps).
Kawasaki	Kawasaki Motors Corp., U.S.A. 9950 Jeronimo Road Irvine, CA 92718-2016 (714) 770-0400	Kawasaki Heavy Industries, Ltd. 1-1, Kawasaki-cho Akashi 673, Hyogoken, Japan Kawasaki Motors Manufacturing 6600 N.W. 27th St. Lincoln, Nebraska 68524	1967	All-terrain vehicles, Jet Ski®, Jet Mate Watercraft, accessories for motorcycles and products above, small engines, generators, watercraft trailers and utility vehicles.
Suzuki	American Suzuki Motor Corp. 3251 East Imperial Hwy. Brea, CA 92621 (714) 996-7040	Suzuki Motor Co., Ltd. Hamamatsu-Nishi, P.O. Box 1 432-91 Hamamatsu, Japan	1963	Automobiles, all-terrain vehicles, outboard motors, generators, accessories for motorcycles and products above.
Yamaha	Yamaha Motor Corp., U.S.A. 6555 Katella Ave. Cypress, CA 90630 (714) 761-7300	Yamaha Motor Co., Ltd. 2500 Shingai, Iwata-Shi Shizuoka-Ken, 438 Japan	1960	Snowmobiles, go cart engines, go carts, golf carts, scooters, all-terrain vehicles, outboard engines, water vehicles, stern drives, outdoor power products (generators, snowblowers, lawnmowers), accessories for motorcycles and products above.

Source: Information obtained by the Motorcycle Industry Council from the U.S. distributors above.

OTHER U.S. MOTORCYCLE MANUFACTURERS/ DISTRIBUTORS

While the six major brands accounted for roughly 99% of the 1989 retail sales in the United States, the remaining 1% of new motorcycle and scooter sales are distributed among almost 20 brands.

Although the U.S. motorcycle market share for most of these brands listed below is quite small, some of these brands are greater contributors to foreign markets.

OTHER 1990 U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

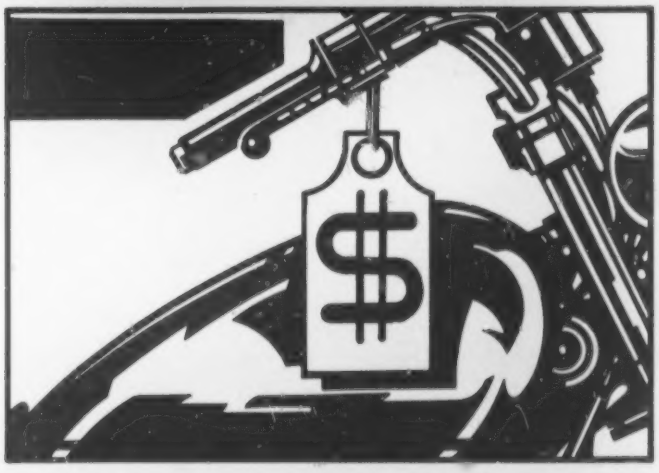
BRAND	PRIMARY U. S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
ATK	ATK Leitner Corporation 5430 Union Pacific Avenue City of Commerce, CA 90022 (213) 722-8880	U.S.
Beta	Cosmopolitan Motors 301 Jacksonville Rd. Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Bimota	Cosmopolitan Motors 301 Jacksonville Rd. Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Buell	Buell Motor Company, Inc. 214 Jefferson Street Mukwongo, Wisconsin 53149 (414) 363-3767	U.S.

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Cagiva	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07006 (201) 882-9141	Italy
Cobra Trike	Cobra Trikes, Inc. 1205 W. Applegate Lane Jeffersonville, Indiana 47130 (812) 288-6405	U.S.
Ducati	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07006 (201) 882-9141	Italy
Husqvarna	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07006 (201) 882-9141	Italy

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Italjet	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Jawa	American Jawa, Ltd. 185 Express Street Plainview, L.I., New York 11803 (516) 938-3210	Czechoslovakia
KTM	KTM America 1906 Broadway Lorain, Ohio 44052 (216) 244-2726	Austria
Lambretta	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Spain
Maely	Maely Industries 8580 Bedford Motorway Corona, California 91719 (714) 277-8989	U.S.
Montesa	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Spain

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Moto Guzzi	Moto Guzzi North America 1501 Caton Avenue Baltimore, Maryland 21227 (301) 646-6400	Italy
Motomarina	Marina Mobili Inc. P.O. Box 840 Kinnelon, New Jersey 07405 (201) 838-6100	Italy
Moto Morini	Herdan Corporation Route 61 Port Clinton, Pennsylvania 19549 (215) 562-3155	Italy
Riva	Yamaha Motor Corp., U.S.A. 6555 Katella Avenue Cypress, California 90630 (714) 761-7300	Japan
Strociek	Strociek Engineering 10485 Product Drive Rockford, Illinois 61111 (815) 654-0141	U.S.

NOTE: This list includes only those companies manufacturing and/or distributing motorcycles in the U.S. as of April 1, 1990. Although this information was obtained from the most authoritative sources available (individual companies were contacted by the Motorcycle Industry Council), the Motorcycle Industry Council is not responsible for accuracy or completeness.



The Retail Marketplace

MOTORCYCLE RETAIL OUTLETS, EMPLOYEES, AND PAYROLL

Of the estimated 10,704 retail outlets selling motorcycles and related products in the U.S. in 1990, 34% are retail outlets franchised to sell new motorcycles, scooters, or all-terrain vehicles (ATVs), and 66% are retail outlets specializing in motorcycle related parts, accessories, riding apparel, used vehicles, or service, but not franchised to sell new motorcycles, scooters or ATVs.

Motorcycle retail outlets employ an estimated 49,564 employees at an estimated annual payroll of $779 million, including owner and manager salaries and advances.

In most states, franchised retail motorcycle dealers have formed nonprofit associations to engage in government relations and other activities for the good of the motorcycle industry in their state. The MIC recognizes and supports these state associations with several information exchange programs. The addresses of the state associations are listed on pages 45-46 of this publication.

	1990 Franchised Motorcycle Retail Outlets			1990 Non-Franchised Motorcycle Retail Outlets			1990 Total Motorcycle Retail Outlets		
	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)
Total U.S.	3,600	26,752	$ 448,674	7,104	22,812	$ 330,264	10,704	49,564	$ 778,938
State									
Alabama	57	410	$ 6,438	66	201	$ 2,484	123	611	$ 8,922
Alaska	27	220	3,986	17	71	808	44	291	4,794
Arizona	44	359	6,496	106	440	5,035	150	799	11,531
Arkansas	44	317	4,970	65	198	2,446	109	515	7,416
California	344	2,804	50,786	803	3,332	37,143	1,147	6,136	87,929
Colorado	70	571	10,334	123	510	5,843	193	1,081	16,177
Connecticut	41	318	5,505	74	211	3,093	115	529	8,598
Delaware	8	62	1,074	18	51	752	26	113	1,826
D.C.	0	0	0	3	9	125	3	9	125
Florida	132	950	14,910	312	952	11,742	444	1,902	26,652
Georgia	85	612	9,601	96	293	3,613	181	905	13,214
Hawaii	6	49	886	28	116	1,330	34	165	2,216
Idaho	43	350	6,348	52	216	2,470	95	566	8,818
Illinois	147	1,007	16,244	329	971	18,095	476	1,978	34,339
Indiana	92	630	10,167	247	729	13,585	339	1,359	23,752
Iowa	66	452	7,293	195	575	10,725	261	1,027	18,018
Kansas	55	377	6,078	105	310	5,775	160	687	11,853
Kentucky	44	317	4,970	125	381	4,705	169	698	9,675
Louisiana	55	396	6,213	85	259	3,199	140	655	9,412
Maine	33	256	4,431	55	157	2,299	88	413	6,730
Maryland	37	267	4,968	72	205	3,009	109	492	7,977
Massachusetts	55	426	7,384	140	399	5,851	195	825	13,235
Michigan	147	1,007	16,244	292	861	16,060	439	1,868	32,304
Minnesota	85	582	9,393	195	575	10,725	280	1,157	20,118
Mississippi	38	274	4,292	41	125	1,543	79	399	5,835
Missouri	79	541	8,730	142	419	7,810	221	960	16,540
Montana	45	367	6,644	37	154	1,758	82	521	8,402
Nebraska	60	411	6,630	56	165	3,080	116	576	9,710
Nevada	25	204	3,691	30	125	1,425	55	329	5,116
New Hampshire	37	267	4,968	46	131	1,923	83	418	6,891
New Jersey	74	574	9,935	140	399	5,851	214	973	15,786
New Mexico	30	245	4,429	42	174	1,995	72	419	6,424
New York	180	1,395	24,167	412	1,174	17,220	592	2,569	41,387
North Carolina	100	720	11,296	123	375	4,629	223	1,095	15,925
North Dakota	33	226	3,647	30	89	1,650	63	315	5,297
Ohio	141	966	15,561	584	1,723	32,120	725	2,689	47,701
Oklahoma	46	331	5,196	90	275	3,387	136	606	8,583
Oregon	56	456	8,268	100	415	4,750	156	871	13,018
Pennsylvania	193	1,496	25,912	425	1,211	17,763	618	2,707	43,675
Rhode Island	11	85	1,477	24	68	1,003	35	153	2,480
South Carolina	41	295	4,631	63	192	2,371	104	487	7,002
South Dakota	31	212	3,426	28	83	1,540	59	295	4,966
Tennessee	72	518	8,133	104	317	3,914	176	835	12,047
Texas	203	1,462	22,930	353	1,077	13,286	556	2,539	36,216
Utah	36	293	5,315	49	203	2,326	85	496	7,643
Vermont	18	140	2,417	33	94	1,379	51	234	3,796
Virginia	69	497	7,794	104	317	3,914	173	814	11,708
Washington	83	676	12,254	129	535	6,128	212	1,211	18,382
West Virginia	36	279	4,833	50	143	2,090	86	422	6,923
Wisconsin	113	774	12,487	248	732	13,640	361	1,506	26,127
Wyoming	33	269	4,872	18	75	855	51	344	5,727

Note: A **franchised motorcycle outlet** is defined as a motorcycle retail outlet franchised to sell new motorcycles, scooters, or all-terrain vehicles (ATVs). A **non-franchised motorcycle outlet** is defined as a motorcycle retail outlet specializing in the sale of either motorcycle related parts, accessories, riding apparel, used vehicles, or service, but not franchised to sell new motorcycles, scooters, or ATVs. Because of differences in list sources, direct comparisons should not be made between the number of **non-franchised** outlets each year.

Source: 1990 Motorcycle Retail Outlet Audit, Motorcycle Industry Council, Inc., Irvine, California, August 1990.
1989 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, May 1990.

MOTORCYCLE OUTLET RETAIL SALES

1989 motorcycle, scooter and ATV related sales and services by all retail outlets nationwide are estimated to be $4.5 billion, of which $3.4 billion were generated by outlets franchised to sell new motorcycles, scooters and ATVs, and $1.1 billion by non-franchised motorcycle outlets which include parts, accessory, used vehicle and service stores.

New motorcycles, scooters, and ATVs represented almost half (42%) of the total 1989 related retail sales and services. Parts, accessories, and riding apparel represented about 33%, used vehicles 12%, and service labor 11%. Other related sales, such as insurance premiums and extended warranties, accounted for about 2% of the total motorcycle, scooter and ATV related retail sales and services.

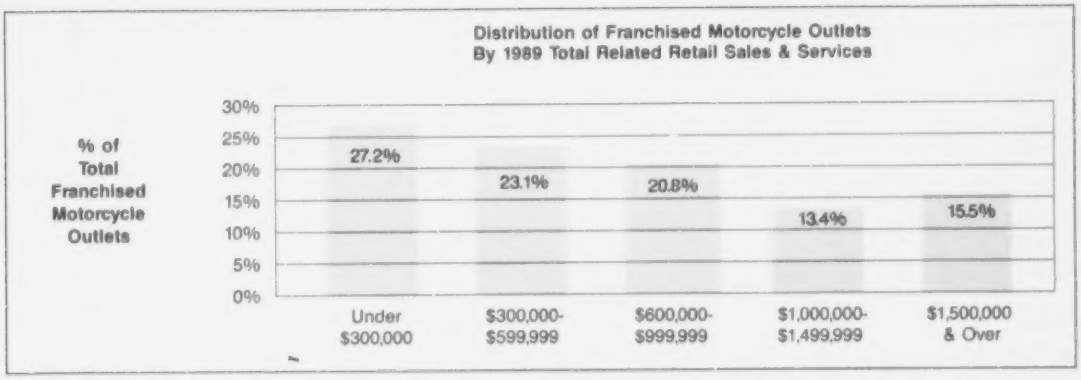
The distribution of franchised and non-franchised motorcycle outlets by the 1989 total motorcycle and ATV related retail sales and services is shown below.

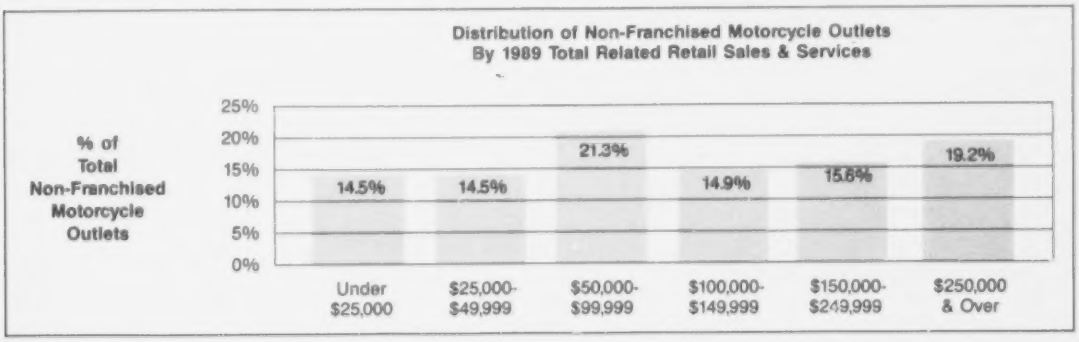
1989 ESTIMATED RETAIL SALES BY U.S. MOTORCYCLE OUTLETS

	1989 Estimated Motorcycle Related Retail Sales					
	Franchised M/C Outlets	% of Total	Non-Franchised M/C Outlets	% of Total	All Motorcycle Retail Outlets	% of Total
New Motorcycles, Scooters & ATVs	$1,873,000,000	55.5%	$ 0	0.0%	$1,873,000,000	42.0%
Used Motorcycles, Scooters & ATVs	428,700,000	12.7%	108,900,000	10.0%	537,600,000	12.1%
Parts, Accessories, & Riding Apparel	742,500,000	22.0%	759,000,000	69.7%	1,501,500,000	33.6%
Service Labor	256,500,000	7.6%	217,800,000	20.0%	474,300,000	10.6%
Other M/C Related Sales	74,300,000	2.2%	3,200,000	0.3%	77,500,000	1.7%
Total M/C Related Sales	$3,375,000,000	100.0%	$ 1,088,900,000	100.0%	$4,463,900,000	100.0%

NOTE: Comparisons can not be made with prior years due to revisions in new vehicle sales estimates and differences in dealer list sources. See page 24 for outlet definitions.

DISTRIBUTION OF MOTORCYCLE OUTLETS BY 1989 RETAIL SALES





Source: 1989 Motorcycle Retail Outlet Audit, Motorcycle Industry Council, Inc., Irvine, California, August 1989.
1989 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, May 1990.

MOTORCYCLE RETAIL OUTLET PROFILE

In 1989 the typical franchised motorcycle outlet employed an average of 7.5 persons annually at an average annual payroll of $124,000. The franchised motorcycle outlet had been in business at the same location for an average of 13 years and under its current ownership for an average of 13 years. Franchised motorcycle outlets sold an average of 95 new and 34 used motorcycle, scooter, and ATV units in 1989. The average total motorcycle related sales and services for a franchised motorcycle outlet was $595,000 in 1989.

In 1989 the typical non-franchised motorcycle outlet employed an average of 3.4 persons annually at an average annual payroll of $49,000. The non-franchised motorcycle outlets had been in business at the same location for an average of 6 years and under its current ownership for an average of 9 years. The average total motorcycle related sales and services for a non-franchised motorcycle outlet was $157,000 in 1989. The distribution by type of motorcycle related sales and services for both franchised and non-franchised outlets is shown below.

1989 MOTORCYCLE RETAIL OUTLET PROFILE

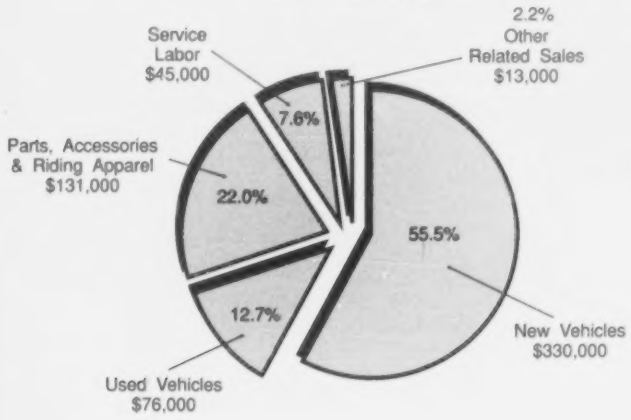
	Franchised M/C Outlet	Non-Franchised M/C Outlet
	Average	Average
Number of Employees	7.5	3.4
Full-Time	6.4	2.5
Part-Time	1.1	0.9
Employee Payroll (Including owner's and mgr's salary and advances)	$124,000	$49,000
Years At Same Location (Under current & previous ownership)	13.0	6.0
Years Under Current Ownership (Whether or not at this location)	13.0	9.0
Advertising & Promotional Expenditures	$9,700	$1,500
New Motorcycle, Scooter, & ATV Unit Sales	95	N/A
Used Motorcycle, Scooter, & ATV Unit Sales	34	N/A
Number of New Brands Carried	1.7	N/A

Note: See page 24 for outlet definitions

DISTRIBUTION OF MOTORCYCLE RELATED SALES PER OUTLET

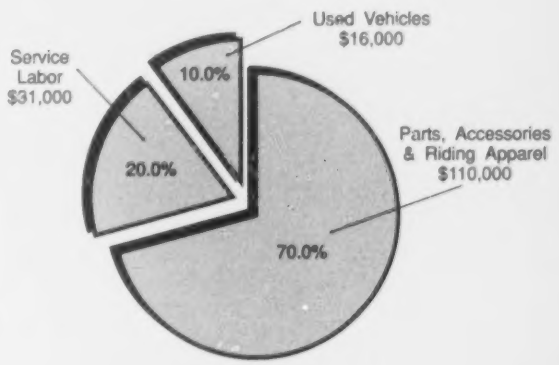
Franchised Motorcycle Outlet

Total - $595,000



Non-Franchised Motorcycle Outlet*

Total - $157,000



* Represents average distribution of sales by all non-franchised outlets combined and may not be typical of individual motorcycle parts, accessory, or service outlets.

Source: 1989 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, May 1990.

Motorcycle Usage

U.S. MOTORCYCLE USAGE ON-HIGHWAY AND OFF-HIGHWAY BY STATE

Of the 6.6 million motorcycles, scooters and ATVs in use in 1989, it is estimated that 3.44 million were used on public roads and 3.62 million were used off-highway some of the time.

Of the 3.44 million motorcycles used on-highway, the majority (88%) were on-highway motorcycles. Dual purpose motorcycles accounted for 6% of the motorcycles used on-highway.

Of the 3.62 million motorcycles and ATVs used off-highway at some time, the majority were off-highway motorcycles and ATVs (82%), while dual purpose motorcycles accounted for 10%. Only 7% of the motorcycles used off-highway at some time were on-highway motorcycles.

MOTORCYCLES USED ON AND OFF-HIGHWAY IN 1989

	U.S. Total	Model Type		
		On-Highway	Off-Highway	Dual Purpose
Total Motorcycles in Use (% of total in use)	6,555,000 (100%)	3,128,000 (100%)	2,987,000 (100%)	440,000 (100%)
Motorcycles Used On-Highway at Some Time (% of total in use)	3,444,000 (53%)	3,030,700 (97%)	206,000 (7%)	207,300 (47%)
Motorcycles Used Off-Highway at Some Time (% of total in use)	3,624,000 (55%)	256,600 (8%)	2,987,000 (100%)	380,400 (86%)

MOTORCYCLE USAGE BY STATE IN 1989

State	Total Motorcycles In Use	Motorcycles Used On-Highway At Some Time	Motorcycles Used Off-Highway At Some Time
Alabama	140,700	56,800	95,400
Alaska	36,200	8,500	30,800
Arizona	104,400	50,400	62,500
Arkansas	129,100	42,300	97,200
California	832,300	487,100	412,600
Colorado	92,300	48,900	50,900
Connecticut	72,100	46,100	31,100
Delaware	13,400	6,800	7,500
D.C.	1,800	1,700	100
Florida	273,300	163,400	131,500
Georgia	200,700	93,000	123,200
Hawaii	Not Available		
Idaho	53,400	20,100	39,300
Illinois	228,600	156,200	88,800
Indiana	175,600	106,600	81,400
Iowa	110,700	76,200	42,300
Kansas	64,200	38,400	30,800
Kentucky	88,600	37,300	58,200
Louisiana	121,700	44,600	86,200
Maine	52,000	26,800	29,000
Maryland	83,200	48,400	41,200
Mass.	112,900	70,300	50,200
Michigan	294,700	147,600	168,200
Minnesota	152,500	83,000	80,800
Mississippi	79,200	25,800	59,400
Missouri	133,600	54,000	89,600
Montana	37,600	13,800	27,800
Nebraska	50,000	23,500	30,600
Nevada	39,900	19,900	23,300
N.H.	55,800	32,000	27,800
New Jersey	125,800	70,900	64,200
New Mexico	45,700	23,300	26,700
New York	299,700	178,100	143,400
North Carolina	158,800	66,900	104,200
North Dakota	25,300	13,000	14,500
Ohio	264,600	151,100	131,900
Oklahoma	90,400	44,300	55,000
Oregon	108,700	48,300	69,600
Pennsylvania	268,100	128,300	160,500
Rhode Island	21,400	15,900	6,900
South Carolina	66,900	34,200	37,700
South Dakota	26,900	14,200	14,900
Tennessee	156,900	61,700	107,900
Texas	423,000	238,600	217,600
Utah	80,500	30,300	58,400
Vermont	20,300	9,300	12,600
Virginia	133,600	70,400	74,000
Washington	145,800	78,700	79,600
West Virginia	72,600	21,600	57,100
Wisconsin	167,100	106,000	73,400
Wyoming	22,400	8,400	16,200
U.S. Totals	6,555,000	3,444,000	3,624,000

Note: See page 6 for model type definitions.
Includes scooters and ATVs, and excludes mopeds and nopeds.
The 1984 - 1989 estimates are comparable only to the 1980 and revised 1979 estimates.

Source: 1989 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.

PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

Excluding Alaska which is predominantly public land, over one fifth (22%) of the total U.S. acreage, or 419 million acres, is public land managed by Federal and state government. Of this 419 million acres, 86% is in the western states.

In 1989 an estimated 3.6 million motorcycles and ATVs were used for off-highway recreational purposes. In 1989 the off-highway motorcycle and ATV industry generated an estimated $3.3 billion in consumer sales and services, and state taxes and licensing, of which $0.9 billion is attributed to the retail sales of 303,000 new motorcycles and ATVs.

1989 PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

State	Total Acreage	(1) Public Land Acreage Fed. Gov't.	State Gov't.	% of State	(2) 1989 Sales of New Mcs. Used Off-Hwy At Some Time	(3) Total Mcs. Used Off-Hwy At Some Time	(4) 1989 Est. Annual Economic Value Of Off-Hwy Retail Mrktplace	Off-Hwy Mc. Penetration Off-Hwy Mcs. Per 100 Pop.	Off-Hwy Mcs. Per 1000 Public Acres
	(000)	(000)	(000)				($000)		
Alabama	32,678	1,132	48	3.6	6,800	95,400	$ 67,904	2.3	80.8
Alaska	365,482	318,357	3,110	88.0	4,000	30,800	69,663	5.8	0.1
Arizona	72,688	31,673	37	43.6	4,000	62,500	38,508	1.8	2.0
Arkansas	33,599	3,399	44	10.2	9,500	97,200	110,956	4.0	28.2
California	100,207	46,323	1,269	47.5	39,300	412,600	365,050	1.4	8.7
Colorado	66,486	24,189	287	36.8	4,700	50,900	49,164	1.5	2.1
Connecticut	3,135	14	181	6.2	2,600	31,100	24,650	1.0	159.5
Delaware	1,266	30	11	3.2	800	7,500	7,590	1.1	182.9
Dist. of Columbia	39	11	N/A	28.2	0	100	N/A	0.0	9.1
Florida	34,721	4,260	278	13.1	10,500	131,500	100,333	1.0	28.9
Georgia	37,295	2,299	61	6.3	10,000	123,200	93,272	1.9	52.2
Hawaii	4,106	687	25	17.3	N/A	N/A	N/A	0.0	0.0
Idaho	52,933	33,759	47	63.9	3,600	39,300	50,581	3.9	1.2
Illinois	35,795	500	363	2.4	7,400	88,800	72,464	0.8	102.9
Indiana	23,158	437	54	2.1	5,400	81,400	49,679	1.5	165.8
Iowa	35,860	160	52	0.6	3,400	42,300	33,482	1.5	199.5
Kansas	52,511	582	37	1.2	1,600	30,800	22,963	1.2	49.8
Kentucky	25,512	1,401	42	5.7	5,900	58,200	58,375	1.6	40.3
Louisiana	28,868	1,181	38	4.2	6,400	86,200	58,626	2.0	70.7
Maine	19,848	150	72	1.1	2,500	29,000	38,056	2.4	130.6
Maryland	6,319	197	216	6.5	4,500	41,200	39,756	0.9	99.8
Massachusetts	5,035	83	266	6.9	4,100	50,200	41,118	0.8	143.8
Michigan	36,492	3,529	253	10.4	13,800	168,200	149,101	1.8	44.5
Minnesota	51,206	3,460	3,441	13.5	7,000	80,800	73,613	1.9	11.7
Mississippi	30,223	1,678	22	5.6	5,000	59,400	81,423	2.3	34.9
Missouri	44,248	2,072	107	4.9	6,400	89,600	69,887	1.7	41.1
Montana	93,271	28,236	52	30.3	3,000	27,800	45,214	3.4	1.0
Nebraska	49,032	714	148	1.8	2,500	30,600	39,287	1.9	35.5
Nevada	70,264	59,815	144	85.3	3,000	23,300	45,242	2.1	0.4
New Hampshire	5,769	740	30	13.3	1,900	27,800	26,453	2.5	36.1
New Jersey	4,813	151	300	9.4	5,800	64,200	53,478	0.8	142.4
New Mexico	77,766	25,871	119	33.4	1,900	26,700	27,522	1.7	1.0
New York	30,681	1,460	258	5.6	11,300	143,400	115,424	0.8	83.5
No. Carolina	31,403	2,219	125	7.5	10,500	104,200	98,547	1.6	44.5
North Dakota	44,452	1,942	16	4.4	1,000	14,500	11,348	2.2	7.4
Ohio	26,222	322	193	2.0	9,400	131,900	93,041	1.2	256.1
Oklahoma	44,088	867	95	2.2	3,200	55,000	44,416	1.7	57.2
Oregon	61,599	30,031	89	48.9	6,800	69,600	68,079	2.5	2.3
Pennsylvania	28,804	639	276	3.2	14,400	160,500	148,816	1.6	175.4
Rhode Island	677	5	9	2.1	700	6,900	6,269	0.7	492.9
So. Carolina	19,374	1,169	79	6.4	4,200	37,700	54,049	1.1	30.2
So. Dakota	48,882	2,733	113	5.8	1,200	14,900	14,037	2.1	5.2
Tennessee	26,728	1,988	120	7.9	8,700	107,900	88,334	2.2	51.2
Texas	168,218	3,335	225	2.1	15,300	217,600	150,225	1.1	61.1
Utah	52,697	33,569	95	63.9	3,600	58,400	54,810	3.4	1.7
Vermont	5,937	322	171	8.3	1,200	12,600	14,044	2.2	25.6
Virginia	25,496	2,455	54	9.8	5,400	74,000	54,112	1.2	29.5
Washington	42,694	12,459	234	29.7	6,800	79,600	68,261	1.7	6.3
West Virginia	15,411	1,165	206	8.9	4,500	57,100	69,256	3.1	41.6
Wisconsin	35,011	1,890	119	5.7	6,200	73,400	68,641	1.5	36.5
Wyoming	62,343	31,431	119	50.6	1,300	16,200	14,979	3.4	0.5
U.S. Total	2,271,342	727,111	13,750	32.6	303,000	3,624,000	$ 3,250,100	1.5	4.9

Note: The 1989 sales, population, and economic figures above are not comparable to prior year estimates due to sales and population revisions. Includes competition motorcycles and three and four-wheeled all-terrain vehicles.

Source: (1) Statistical Abstract of the United States, 1989, U.S. Department of Commerce, Bureau of Census. Includes state park and recreation areas only.
(2) Derived from MIC Manufacturers Shipment Reporting System, 1989 Annual Report.
(3) 1989 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
(4) Derived from "Economic Value of the Motorcycle Retail Marketplace," on page 11, by M.I.C. Includes retail sales of motorcycles and ATVs (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registration fees.

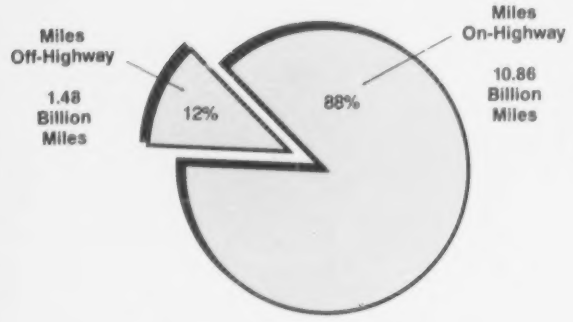
MILES TRAVELED ON AND OFF-HIGHWAY BY MODEL TYPE

It is estimated that the 6.6 million motorcycles, scooters, and ATVs in use traveled roughly 12.3 billion miles (including miles traveled off-highway), compared to an estimated 2.082 billion miles traveled by all other motor vehicles in 1989. 88% of the total motorcycle mileage in 1989 was on public highways and the remaining 12% was off-highway. On-highway motorcycles accounted for the majority (86%) of motorcycle travel, while travel on dual purpose and off-highway motorcycles, including ATVs, represented 4% and 10% respectively.

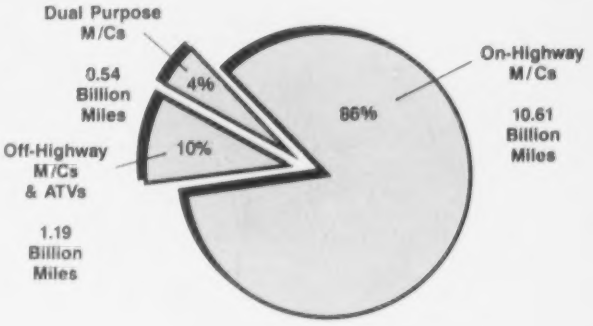
The majority (97%) of motorcycle mileage on public roads was accumulated by on-highway motorcycles, while only 3% of the mileage was traveled on dual purpose motorcycles. Off-highway motorcycles and ATVs accumulated over three fourths (80%) of the miles traveled off-highway, and the remaining 20% was divided between dual purpose motorcycles with 14% and on-highway motorcycles with 6%.

12.3 BILLION MOTORCYCLE MILES TRAVELED IN 1989

Miles On-Highway and Off-Highway

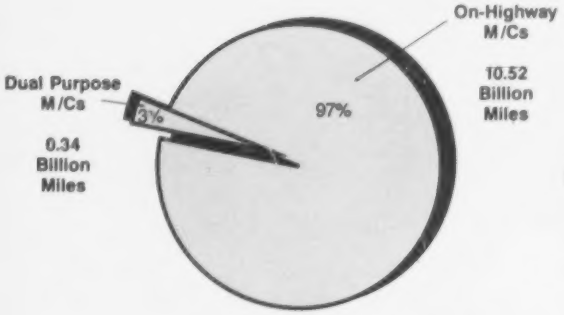


Miles by Model Type

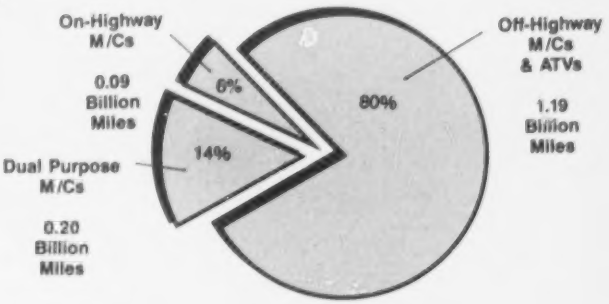


ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE

Mileage On-Highway



Mileage Off-Highway



Note: The 1989 figures above are comparable only to 1988, 1987, 1986, 1985, and 1980 estimates.

Source: Derived by the Motorcycle Industry Council from the following sources:
1989 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research,Inc., Cincinnati, Ohio. February 1986.

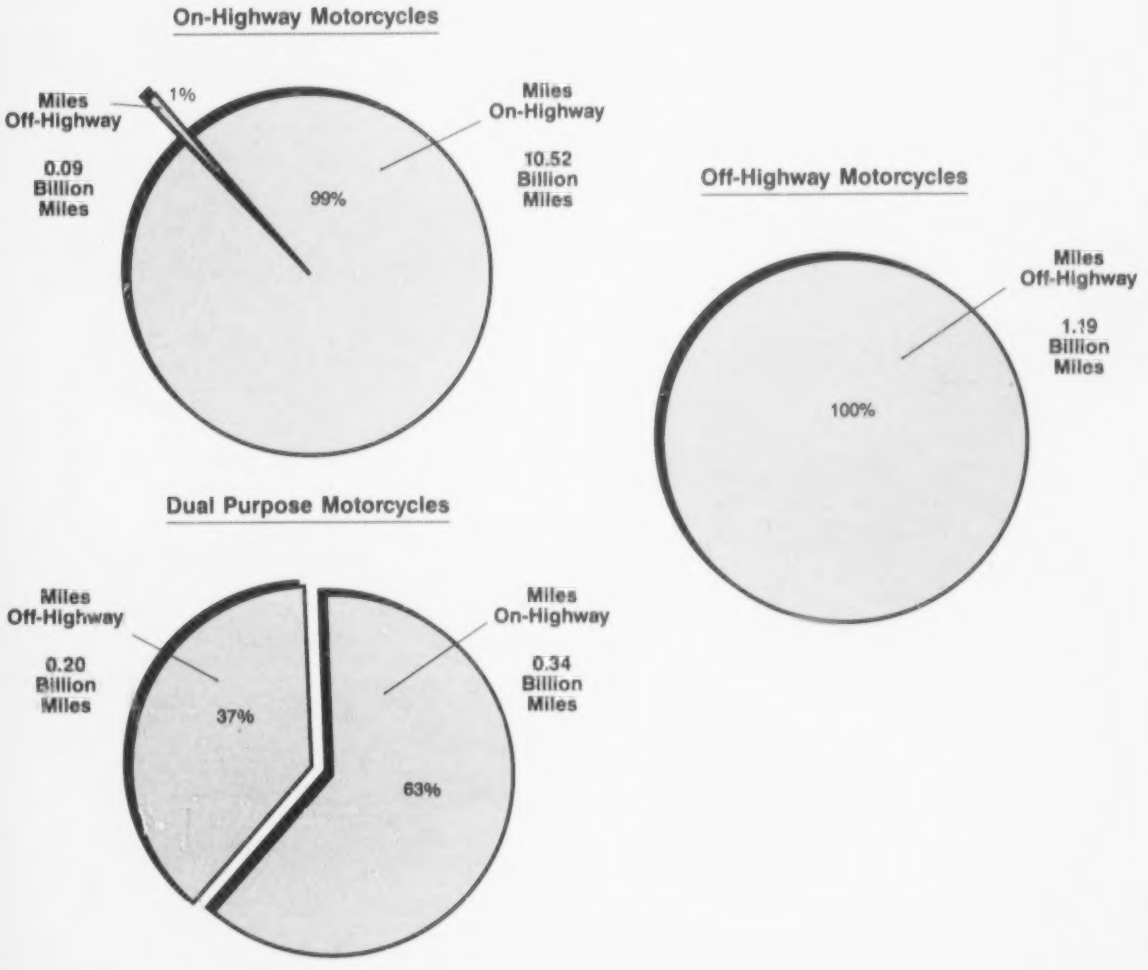
MILES TRAVELED BY MODEL TYPE FOR ON AND OFF-HIGHWAY

Of the total miles traveled by on-highway motorcycles in 1989, it is estimated that 99% was on public highways and the remaining 1% off-highway.

It is assumed that all of the mileage by off-highway motorcycles and ATVs was off public roads since these vehicles do not comply with the Federal Motor Vehicle Safety Standards for use on public roads.

Mileage by dual purpose motorcycles was somewhat greater on-highway (63%) than mileage off-highway (37%) in 1989.

ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE



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MOTORCYCLE AVERAGE ANNUAL MILEAGE

In 1989 motorcycles ridden on-highway traveled an average of 3,340 miles. On-highway motorcycles tend to travel more than twice the distance traveled by dual purpose motorcycles on public highways. Motorcycles and ATVs ridden off-highway traveled an average of 408 miles in 1989. Off-highway motorcycles and ATVs combined tend to travel about the same distance off-highway as dual purpose motorcycles.

Based on 1985 consumer research, the majority of on-highway (79%) and off-highway (73%) riding occurred in the spring and summer. Riding in rural areas accounted for 41% of the miles ridden on-highway and 65% of the miles ridden off-highway. Weekend riding accounted for about half (52%) of on-highway riding and two thirds (68%) of off-highway riding.

AVERAGE ANNUAL MILEAGE TRAVELED IN 1989

Average Annual Mileage Traveled in 1989	Total Motorcycles	On-Highway Motorcycles	Off-Highway Motorcycles & ATVs	Dual Purpose Motorcycles
On-Highway	3,340	3,476	—	1,493
Off-Highway	408	339	399	524

ANNUAL MILEAGE BY SEASON, RIDING AREA, WEEKENDS

	Average % of Annual Mileage*	
	On-Highway	Off-Highway
By Season		
Spring	27%	28%
Summer	52%	45%
Fall	16%	18%
Winter	5%	10%
By Riding Area		
Major Cities	21%	21%
Suburban Areas	39%	14%
Rural Areas	41%	65%
On Weekends	52%	68%

*Percentages are mean averages and therefore do not always add up to 100%.

Source: 1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.
1989 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.

ON-HIGHWAY MOTORCYCLE FUEL ECONOMY AND COMMUTING

On average, motorcycles used on-highway are more fuel-efficient than most new automobiles. Motorcycles used on-highway travel from about 40 to 120 miles per gallon of gasoline, depending on the size of the engine.

Of the 3.4 million motorcycles used on-highway, an estimated 2.1 million were used to commute to work or school at some time in 1989. The average number of days commuted in a four week period was 7, and the average number of miles commuted round trip was 23.

1990 MOTORCYCLE FUEL ECONOMY FIGURES

	Estimated Average Miles Per Gallon*	
Engine Displacement	On-Highway Motorcycles	Dual Purpose Motorcycles
Under 125 cc	120	106
125-349 cc	76	81
350-449 cc	57	64
450-749 cc	54	59
Over 749 cc	43	—

* Derived from manufacturer exhaust emission test results. The U.S. EPA requires manufacturers to certify exhaust emissions for all 50 cc and greater on-highway and dual purpose motorcycles. The EPA does not require fuel economy testing for motorcycles. However, fuel economy figures can be derived from the exhaust emission test results. MPG figures were derived in this way from 60, 1990 test vehicles produced by the four leading manufacturers which represent about 85% of the motorcycle sales nationwide.

MOTORCYCLE COMMUTING

Motorcycles Used to Commute to Work or School in 1989 (at some time)	2,100,000
Average Days Commuted in 4 Week Period	7 Days
Average Miles Commuted Round Trip	23 Miles

Source: MPG figures derived from tests performed by manufacturers in accordance with the U.S. EPA motorcycle exhaust emission certification test procedures.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.

MOTORCYCLE RIDER EDUCATION PROGRAMS

It has become apparent in recent years that rider education and training are important steps in motorcycle accident prevention. Motorcycle accident statistics indicate that a substantial percentage of such accidents involve riders with limited experience and training.

Prior to 1973 there were few organized education and training programs to instruct beginners in safe motorcycle operation. Since 1973, the Motorcycle Safety Foundation (MSF), a private nonprofit traffic safety organization, has been successful in developing a motorcycle rider education program which includes instructor preparation and classroom and on-cycle rider instruction and is available to the public, as well as private schools and organizations.

MOTORCYCLE SAFETY FOUNDATION RIDER EDUCATION PROGRAMS

The Motorcycle Safety Foundation's beginning rider education program curriculum, known as the *Motorcycle RiderCourse: Riding and Street Skills* (MRC:RSS) is research-based and field-evaluated. It offers the latest in teaching techniques and instructional guidelines, as well as providing a complete set of educational materials.

The introductory course for new motorcyclists was published in 1976 as the Motorcycle Rider Course (MRC). A revised MRC, the Motorcycle RiderCourse:Riding and Street Skills (MRC:RSS) was introduced in 1986. The MRC:RSS is presently used nationally by state agencies, all branches of the military, and independent sponsors. The Experienced RiderCourse, released in January, 1989, is also available. For the nearest course location, call toll free (800) 447-4700.

Trained Instructors play an important part in the success of a rider education course. MSF Chief Instructors have trained close to 15,200 Instructors since 1973. Instructors complete a course of instruction that includes performance evaluation as a teacher and a motorcycle rider.

Motorcycle manufacturers and dealers cooperate by making motorcycles available for student use in the MRC:RSS training programs. 2,800 motorcycles were loaned to MSF recognized sponsors in 1989.

Through these combined efforts motorcyclists have an opportunity to learn to ride safely. Courses meeting MSF minimum standards have prepared nearly 724,000 students since the program originated in 1973.

Most courses are now supported, in part, with funds generated by state legislation and administered by a state agency. The Foundation's goal is to continue this quality rider education effort for the benefit of the motorcycle riding public.

Instructor Preparation

131 Chief Instructors prepared Instructors with MSF materials in 1989.

15,178 Instructors have been prepared with MSF assistance since 1973.

Rider Education Programs

Over 724,000 students have completed courses meeting MSF standards since 1973.

826 sites offered quality rider education courses in 1989.

634 were public sites and 192 were military sites.

The MSF rider education programs are available in most states.

Source: Motorcycle Safety Foundation, Irvine, California

STATE MOTORCYCLE RIDER EDUCATION PROGRAMS

Many state motorcycle rider education programs are supported, in part, with funds provided by state legislation. In recent years a number of states have recognized the benefits of motorcycle rider education, and have enacted legislation to provide motorcycle safety programs. Thus far, 39 states have passed motorcycle rider education legislation. Funding for these programs is obtained through motorcycle license or registration fees, or from special legislative appropriations.

STATE MOTORCYCLE RIDER EDUCATION PROGRAMS

State	MSF Recognized Rider Education Sites in 1989	Military Course Graduates in 1989	Civilian Course Graduates in 1989	MSF Rider Education Instructors Active in 1989	State Legislation For Rider Education Programs (Effective Date)	Estimated Annual State Funding
Alabama	8	377	174	50	Yes (8/8/87)	$190,000
Alaska	4	174	—	16	No	None
Arizona	17	935	1,243	77	Yes (7/24/81)	$ 76,000
Arkansas	6	154	101	27	No	None
California	75	4,711	6,224	434	Yes (1/1/86)	$ 1.3 mil
Colorado	10	270	638	47	Yes (7/1/90)	$276,200
Connecticut	11	145	977	75	Yes (7/1/82)	$118,000
Delaware	5	67	428	31	Yes (7/1/85)	$ 82,000
District of Columbia	2	90	—	9	No	None
Florida	31	1,625	1,839	210	Yes (10/1/87)	$586,000
Georgia	15	439	816	64	Yes (1/1/85)	$226,000
Hawaii	8	550	474	29	Yes (Amended '88)	$ 23,000
Idaho	2	118	—	18	No	None
Illinois	40	—	5,626	252	Yes (1/1/82)	$ 1.2 mil
Indiana	12	130	1,862	142	Yes (1/1/87)	$200,000
Iowa	41	—	1,094	106	Yes (7/1/87)	$250,000
Kansas	11	386	118	33	Yes (9/1/82)	$ 98,000
Kentucky	9	467	188	31	No	None
Louisiana	4	383	—	19	Yes (7/6/87)	$102,000
Maine	7	87	—	22	Yes (7/16/86)	$ 72,000
Maryland	14	145	2,454	135	Yes (7/1/83)	$550,000
Massachusetts	9	89	570	45	Yes (4/7/87)	$190,000
Michigan	59	105	2,199	161	Yes (1/1/84)	$650,000
Minnesota	110	—	1,379	100	Yes (7/1/82)	$500,000
Mississippi	4	375	—	26	No	None
Missouri	8	158	137	56	No	None
Montana	5	53	54	19	Yes (7/1/90)	$ 50,000
Nebraska	10	59	181	33	Yes (8/15/81)	$ 80,000
Nevada	3	229	22	21	No	None
New Hampshire	1	70	—	9	Yes (7/1/89)	$150,000
New Jersey	3	71	322	35	No	None
New Mexico	4	477	1,108	47	Yes (7/1/83)	$ 71,000
New York	13	191	480	112	No	None
North Carolina	19	328	274	68	Yes (10/1/89)	$192,000
North Dakota	9	248	553	46	Yes (1/1/80)	$120,000
Ohio	25	102	1,943	152	Yes (3/11/87)	$ 1.0 mil
Oklahoma	10	405	266	31	No	None
Oregon	7	—	478	55	Yes (10/15/83)	$300,000
Pennsylvania	28	15	7,450	120	Yes (7/1/84)	$ 1.0 mil
Rhode Island	3	75	1,814	20	Yes (1/1/79)	$130,000
South Carolina	8	614	—	34	Yes (6/11/90)	None
South Dakota	22	—	407	14	Yes (7/1/82)	$ 47,000
Tennessee	9	106	197	50	Yes (7/1/88)	$214,000
Texas	49	1,528	2,015	211	Yes (9/1/83)	$ 1.0 mil
Utah	6	164	87	20	Yes (4/23/90)	None
Vermont	1	—	82	10	Yes (6/21/90)	$ 90,000
Virginia	24	989	1,454	166	Yes (5/1/85)	$199,000
Washington	22	505	2,508	92	Yes (6/10/82)	$500,000
West Virginia	0	—	—	8	Yes (7/1/92)	$ 58,000
Wisconsin	21	53	1,515	111	Yes (5/1/82)	$159,500
Wyoming	2	70	42	7	No	None
TOTAL U.S. *	826	18,332	51,793	3,706		

* Excludes military totals overseas.

Source: Motorcycle Safety Foundation, Irvine, California.

STATE MOTORCYCLE OPERATOR LICENSING PROGRAMS

Each year the Motorcycle Safety Foundation surveys the licensing authorities in the nation's 51 licensing jurisdictions on motorcycle operator licensing programs.

The table below summarizes the use of MSF materials in the state motorcycle operator licensing programs. The Foundation's licensing department provides technical assistance and examiner training for states adopting the MSF approved tests.

1989 STATE MOTORCYCLE OPERATOR LICENSING PROGRAMS

MOTORCYCLE USAGE

1989 STATE	TYPE OF SKILL TEST	MOM ADOPTION	MOM KNOWLEDGE TEST	WAIVER FOR RIDER EDUCATION	NUMBER OF MOTORCYCLE TESTING SITES	NUMBER OF DRIVER LICENSE EXAMINERS	NUMBER OF LICENSED DRIVERS (AS OF 6/30/89)	NUMBER OF LICENSED MOTORCYCLE OPERATORS (AS OF 6/30/89)
Alabama	None	Yes	No	N	73	96	2,765,516	4,492
Alaska	MOST/Alternate	Yes	No	N	32	36	372,419	N/A
Arizona	MOST/Alternate / MLST	Yes	Yes	N	15	200	2,375,783	109,000
Arkansas	Alternate	No	No	N	40[1]	24	1,704,461	62,221
California	Lollipop	Yes	Yes	N	202	472	19,290,136	845,881
Colorado	Alternate / MIT	Yes	Yes	S	66	154	2,751,035	336,000
Connecticut	MOST/Alternate	Yes	Yes	N	11	60	2,411,248	169,168
Delaware	Alternate	Yes	No	K,S	4	30	427,172	30,669
Dist. of Columbia	Alternate	No	No	N	1	9	386,081	8,251
Florida	MOST/Alternate	Yes	Yes	K,S	77	956	10,648,019	395,639
Georgia	MLST	Yes	Yes	N	33	200	4,470,768	185,653
Hawaii	Alternate	No	No	N	13	55	634,880	20,176
Idaho	None	No	No	N/A	N/A	44	707,561	N/A
Illinois	Alternate	Yes	Yes	S	104	487	7,200,000	544,496
Indiana	Alternate	No	No	S	38	97	4,593,352	218,792
Iowa	Alternate	Yes	Yes	S	143	42	2,000,000	251,374
Kansas	Alternate	Yes	Yes	K,S	111	156	1,706,123	229,301
Kentucky	Off-Street / On-Street	No	No	N	120	105	2,390,137	75,147
Louisiana	Off-Street	Yes	No	S	80	540	2,636,929	68,534
Maine	MIT	No	No	K	25	35	900,000	32,000
Maryland	Alternate	Yes	No	N	23	120	3,500,000	184,229
Massachusetts	Off-Street	No	No	N	37	142	4,200,000	242,400
Michigan	Alternate	Yes	No	S	73	1,200	6,397,604	379,958
Minnesota	Alternate	Yes	No	N	99	110	3,063,159	293,347
Mississippi	MIT	Yes	Yes	N	85	47	2,029,442	UNK
Missouri	Alternate	Yes	No	N	125	151	3,292,723	268,162
Montana	Alternate	Yes	Yes	N	60	28	685,000	29,000
Nebraska	Alternate / MIT	Yes	Yes	S	95	62	1,300,000	41,623
Nevada	MOST/Alternate	Yes	Yes	N	31	22	772,152	39,833
New Hampshire	Alternate	No	No	S	15	24	809,398	72,189
New Jersey	Off-Street / On-Street	Yes	No	N	37	75	5,300,000	244,000
New Mexico	MOST/Alternate	Yes	Yes	K,S	25	20	1,075,782	80,000
New York	Off-Street	Yes	No	N	97	150	10,094,192	460,185
North Carolina	Off-Street	No	No	N	189	367	4,421,934	233,657
North Dakota	Alternate	Yes	Yes	N	56	32	431,366	36,614
Ohio	Off-Street	Yes	No	N	94	180	7,369,824	570,416
Oklahoma	MIT	No	No	N	94	60	2,100,000	UNK
Oregon	Alternate	Yes	Yes	N	46	125	2,217,096	211,160
Pennsylvania	Off-Street	Yes	No	K,S	83	101	7,746,698	454,238
Rhode Island	Alternate	No	No	K,S	3	15	500,000	30,000
South Carolina	Off-Street	No	Yes	N	60	120	2,329,823	63,286
South Dakota	MOST/Alternate	Yes	No	K,S	88	45	520,000	N/A
Tennessee	MLST/ On-Street	Yes	No	S	104	200	3,970,998	195,000
Texas	Texas In-Traffic	Yes	No	N	345	331	11,647,750	2,592
Utah	MOST/ MLST	Yes	Yes	N	16	42	1,100,000	60,000
Vermont	Alternate	No	No	N	9	14	423,215	46,293
Virginia	Alternate	Yes	Yes	S	7	193	4,129,510	211,827
Washington	Alternate	Yes	Yes	N	57	283	3,126,210	270,696
West Virginia	None	No	No	N/A	N/A	70	1,300,000	N/A
Wisconsin	MIT	Yes	Yes	N	125	200	3,340,498	304,525
Wyoming	Off-Street	Yes	Yes	N	34	85	348,948	38,428
U.S. Total	Not Applicable	36	22	N/A	3,422	8,412	169,924,922	8,670,452

This information was assembled by the Motorcycle Safety Foundation licensing department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart.

Although this information was obtained from the most authoritative sources available as of July 1989, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

*Exceptions to the rule
1. Some sites
2. 28 of these are circuit sites

Parts of Motocycle Test Waived for Rider Course Graduates
P — Partial K — Knowledge
N — None S — Skill

MOST — Motorcycle Operator Skill Test
Alternate — Alternate MOST
MIT — Motorcyclist In-Traffic Test
Alternate MIT
MLST — Motorcyclist Licensing Skill Test

The Motorcycle Operator Manual (MOM)

The *Motorcycle Operator Manual (MOM)* includes information on proper protective gear, handling different road surfaces and reacting to emergencies. License applicants in a study group increased their knowledge 15 percent by reading the manual. MSF provides free printer's negatives on a loan basis to states adopting the manual.

The Motorcycle Knowledge Test

The Motorcycle Knowledge Test was developed from the contents of the *Motorcycle Operator Manual*. Using multiple choice questions and line drawings, the test emphasizes areas critical to safe riding. MSF will provide a set of tests and slides for duplication to states using automated testing machines.

The Motorcycle Skill Test Practice Guide

The *Practice Guide* is designed to provide motorcycle license applicants with a series of exercises that they can practice in a parking lot before they take their skills test. These exercises are not meant to replace a rider education course but simply to provide practice on necessary skills before testing. MSF provides free printer's negatives on a loan basis for states that would like to provide this booklet to motorcycle applicants.

The Sharing The Road With Motorcycles Information

Studies have shown that most motorcycle accidents are caused by drivers of other vehicles. MSF has developed information for state driver's manuals titled *Sharing The Road With Motorcycles*. It gives other drivers information on conditions and situations commonly faced by motorcyclists.

The Motorcycle Operator Skill Test (MOST)

Nearly three years of research resulted in the development of a new motorcycle operator testing procedure. Research shows the test works. In comparison with an existing state test, the Motorcycle Operator Skill Test (MOST) showed a 15 percent reduction in accidents. When coupled with a rider training program, accidents were reduced 21 percent.

The MOST contains nine exercises that test the skills riders need to operate safely in traffic. Since the test only requires an area 50 x 125 feet, it can be set up in a parking lot. The MOST has been proven to be effective. Some states, however, do not have enough space available to adopt the MOST. The Alternate MOST was developed specifically for these areas. It includes modified portions of important exercises in the MOST along with other basic control exercises.

The Alternate Motorcycle Operator Skill Test (Alternate MOST)

The Alternate MOST was developed specifically for those areas with limited space available and employs the use of manual timing equipment. It includes seven exercises that test basic skills in an off-street setting.

The Motorcyclist Licensing Skill Test (MLST)

The MLST is the most recently developed off-street test drawing on lessons learned from tests that had come before it. This test combines administrative practicality with test reliability and rider safety. Applicants are required to complete a series of three exercises in such a manner as to allow examiners to evaluate riding performance objectively.

The Motorcyclist In-Traffic Test (MIT)

Several states do not have off-street testing facilities or prefer to administer an in-traffic test. The MIT consists of 21 test situations considered to be most important for the safe operation of a motorcycle in traffic. The applicant is scored by an examiner following the motorcycle in another vehicle.

Source: Cycle Safety Info, State Motorcycle Operator Licensing — 1990, Motorcycle Safety Foundation, Irvine, California.

STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

Program efforts and improvements in licensing as well as education are needed to help reduce motorcycle accidents, deaths and injuries. The Motorcycle Safety Foundation has aided in this effort through the development of improved motorcycle operator licensing examinations and the training of state licensing personnel.

Current licensing requirements and procedures by state, for 1989, are outlined below. Nearly all states require a special motorcycle license or endorsement for all individuals, regardless of age, and have special knowledge and skill tests for motorcycle operators. The minimum age for obtaining a motorcycle license ranges from 14 to 18.

1989 STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

1989 STATE	SPECIAL LICENSE OR ENDORSEMENT CODE	DURATION OF LICENSE	LENGTH OF TIME REQUIRED TO HOLD PERMIT	LENGTH OF TIME PERMIT IS VALID	MINIMUM AGE FOR A M/C LICENSE WITHOUT DRIVER EDUCATION	MINIMUM AGE FOR A M/C LICENSE WITH DRIVER EDUCATION	RIDER EDUCATION PREREQUISITE TO LICENSING	SKILL TEST ADMINISTERED ON APPOINTMENT (APPT) OR WALK-IN (WI) BASIS
Alabama	MDC,C	4	No	N/A	14/16	N/A	No	N/A
Alaska	B1	5	No	2 years	16	15	No	APPT/WI
Arizona	Class M	3	No	6 months	16	N/A	No	WI
Arkansas	M,MD	2-4	No	N/A	16	16	No	WI
California	M,Class 4[1]	4	No	1 year	18	16	Under 18	APPT
Colorado	M	5	90 days	180 days	16	16	No	APPT/WI
Connecticut	104,105,106,107,10S	4	No	60 days	16	16	No	APPT
Delaware	MC	4-5	10 days	50 days	18	15	Under 18	WI
Dist. of Columbia	6,7	4	No	60 days	16	16	No	WI
Florida	W,T,MTCY	4-6	No	90 days	15	15	Under 21	APPT
Georgia	Class M	4	No	6 months	16	16	No	WI
Hawaii	2	2-4[3]	No	90 days	15	15	No	APPT/WI
Idaho	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Illinois	M,L	4	No	1 year	18	16	Ages 16-17	WI
Indiana	CP,CH,PPCH,MC	3-4	30 days	1 year	16	16	No	WI
Iowa	8	2-4[3]	No	2 years	16	16	Ages 14-18	APPT
Kansas	D	4	No	6 months	14	14	No	WI
Kentucky	M	4	30 days	6 months	16	16	No	APPT
Louisiana	7	5	No	N/A	15	15	No	WI
Maine	I,D	4	No	1 year	21	16	Ages 16-20	APPT
Maryland	E	4	14 days	180 days	16	16	Under 18	WI
Massachusetts	M	4	No	1 year	17	16-1/2	No	APPT
Michigan	CY	4	30 days	150 days	14	16	Ages 16-17	APPT
Minnesota	C-1,B-3	4	No	45 days	18	16	Ages 16-17	APPT/WI
Mississippi	E	4	No	60 days	15	15	No	WI
Missouri	M,Y	3	No	60 days	16	16	No	WI
Montana	M	4	No	6 months	16	15	No	APPT
Nebraska	6	4	No	1 year	18	16	No	APPT
Nevada	Class 4	4	No	6 months	16	16	No	APPT/WI
New Hampshire	MC	4	No	30 days	18	16	No	APPT
New Jersey	E,F	4	20 days	90 days	17	17	No	APPT
New Mexico	3,4	4	No	6 months	13,14	15	No	APPT/WI
New York	Class 7	4	No	1 year	18	16	No	APPT
North Carolina	MT CYCLE	4	N/A	N/A	18	16	No	APPT/WI
North Dakota	M	4	2 months	6 months	16	14	Ages 14-15	APPT
Ohio	8	4	None	6 months	18	16	Under 18	APPT
Oklahoma	None	N/A	30 days	No limit	14[2]	14[2]	No	APPT/WI
Oregon	M-1,M-2	4	No	1 year	18	16	Ages 16-18	APPT/WI
Pennsylvania	Class 5	4	No	120 days	18	18	No	WI
Rhode Island	H	No limit	30 days	90 days	16	16	Yes	APPT
South Carolina	Class 4	4	15 days	6 months	16	16	No	APPT/WI
South Dakota	Class 2,3	4	No	N/A	14	14	No	WI
Tennessee	Class M	4	No	1 year	16	16	No	WI
Texas	Class M	4	No		18	15	Ages 15-17	WI
Utah	41-2-103,104,110	4	No	6 months	N/A	16	No	WI
Vermont	1M,1A,1B	3	No	60 days	18	18	No	APPT
Virginia	Class C	3/7	No	N/A	16	16	No	WI
Washington	1,2 or 3	4	No	90 days	18	18	Under 18	APPT
West Virginia	No	N/A	N/A	N/A	N/A	N/A	No	N/A
Wisconsin	CIP,PCY,RCY	No limit	10 days	6 months	18	18	No	APPT/WI
Wyoming	M	4	No	1 year	16	16	No	WI

* — Exceptions to the rule
1 — Issued prior to 1/1/89
2 — Restricted to 125cc or less, helmet usage under 18 years of age.
3 — Valid 2 years if between 15-24 or 65 and over; Valid 4 years if 25-64 years old.

This information was assembled by the Motorcycle Safety Foundation licensing department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart.

Although this information was obtained from the most authoritative sources available as of July 1989, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

Source: Cycle Safety Info, State Motorcycle Operator Licensing — 1990, Motorcycle Safety Foundation, Irvine, California.

MOTORCYCLE ACCIDENT STATISTICS BY STATE

The Motorcycle Safety Foundation has compiled the following motorcycle accident statistics for 1989 from state sources.

In 1989 the number of reported motorcycle accidents decreased 16.2% and fatalities decreased 13.1% compared to 1988. The number of accidents per 10,000 registrations declined 12.6%, and fatalities per 10,000 registrations declined 9.4%.

1989 PRELIMINARY MOTORCYCLE ACCIDENT STATISTICS

		Registrations	Reported Accidents	Accidents Per 10,000 Registrations	Fatalities	Fatalities Per 10,000 Registrations	Fatalities Per 100 Accidents
National							
1989		4,218,985	106,261	251.86	3,105	7.36	2.92
1988		4,401,366	126,765	288.01	3,572	8.12	2.82
State Data - 1989							
Alabama	(1,3,7,15,20-22,26,27)	46,460	1,165	250.75	33	7.10	2.83
Alaska	(1,3,7,16,20-22,26,27)	11,801	142	120.33	8	6.78	5.63
Arizona	(1,3,4,7,11,16,20-22,24,26-28)	73,576	2,665	389.39	78	10.60	2.72
Arkansas	(1,7-11,15,20-22,26,27)	15,122	550*	363.71	17	11.24	3.09
California	(1,7,9,16,20-22,26,27)	643,137	20,899	324.95	620	9.64	2.97
Colorado	(1,7,17,20-22,26,27)	112,244	2,081	185.40	37	3.30	1.78
Connecticut	(1,7,8,11,17,20-22,26,27)	55,914	1,508	269.70	51	9.12	3.38
Delaware	(1,7,11,16,20-22,26,27)	7,774	274	352.46	4	5.15	1.46
Dist. of Col.	(1,3,7,15,20-22,26,27)	2,800*	350*	1,250.00	5	17.86	1.43
Florida	(1,7,8,16,20-24,26,27)	195,293	6,940	355.36	220	11.27	3.17
Georgia	(1-4,7,8,15,20-22,26,27)	70,271	2,058	292.87	60	8.54	2.92
Hawaii	(1,7,8,15,20-22,26,27)	12,159	540*	444.12	16	13.16	2.96
Idaho	(1,3,4,7,15,20-22,26,27)	36,108	613	169.77	25	6.92	4.08
Illinois	(1,3,7,11,15,20-22,26,27)	224,062	5,300*	236.54	128	5.71	2.42
Indiana	(1,7,11,17,20-22,26-28)	96,729	3,056	315.93	68	7.03	2.23
Iowa	(1,7,16,20-22,26,27)	139,036	1,500*	107.88	42	3.02	2.80
Kansas	(1,7,8,10,11,16,20-22,26,27)	61,419	1,189	193.59	25	4.07	2.10
Kentucky	(1,7,11,15,20-22,26,27)	31,185	1,084	347.83	29	9.31	2.68
Louisiana	(1,7,11,14,21,22,26,27)	71,017	863	121.52	38	5.35	4.40
Maine	(1,2,7-10,16,20-22,24,26,27)	35,166	634	180.29	20	5.69	3.15
Maryland	(1,2,7,8,11,19-22,26,27)	51,613	1,691	327.63	39	7.56	2.31
Massachusetts	(1,7,17,20-22,26,27)	58,984	1,950	330.60	62	10.51	3.18
Michigan	(1,7,15,20-22,26,27)	142,061	3,336	234.83	68	4.79	2.04
Minnesota	(1,2,7,8,11,16,20-22,26,27)	123,308	1,748	141.76	37	3.00	2.12
Mississippi	(1,7,9,15,20-22,26,27)	18,022	550*	305.18	9*	4.99	1.64
Missouri	(1,7,8,16,20-24,26,27)	79,984	2,047	255.93	65	8.13	3.18
Montana	(1,4,7,8,16,20-22,24,26,27)	24,000*	296	123.33	16	6.67	5.41
Nebraska	(1,7,16,20-22,26,27)	23,560	539	228.78	13	5.52	2.41
Nevada	(1,7,15,20-22,26,27)	17,886	817	456.78	21	11.74	2.57
New Hampshire	(1,7-10,16,20-24,26,27)	32,741	744	227.24	24	7.33	3.23
New Jersey	(1,7,9,11,16,20-22,26,27)	76,401	1,700*	222.51	31	4.06	1.82
New Mexico	(1,7,11,15,20-22,26,27)	38,528	1,342	348.32	35	9.08	2.61
New York	(1,7,17,20-22,26,27)	192,738	4,663	241.93	135	7.00	2.90
North Carolina	(1,7,16,20-22,26-28)	55,844	1,857	332.53	52	9.31	2.80
North Dakota	(1,3,7,17,20-22,26,27)	21,674	186	85.82	1	0.46	0.54
Ohio	(1,7,8,11,14,20-22,26,27)	244,003	4,798	196.64	163	6.68	3.40
Oklahoma	(1,3,7,15,20-22,26,27)	60,863	1,315	216.06	39	6.41	2.97
Oregon	(1,3,7-10,16,20-24,26,27)	69,928	683	97.67	49	7.01	7.17
Pennsylvania	(1,7,11,18,20-22,26,27)	167,201	3,085	184.51	113	6.76	3.66
Rhode Island	(1,3,7,9,16,20-23,26-28)	30,000*	138	46.00	14	4.67	10.14
South Carolina	(1,7,16,20-22,26,27)	30,050	1,359	452.25	45	14.98	3.31
South Dakota	(1-3,7,11,16,20-22,26-28)	29,942	377	125.91	14	4.68	3.71
Tennessee	(1,7,8,11,14,20-22,26,27)	80,591	1,600*	198.53	59	7.32	3.69
Texas	(1,3,7,15,20-22,26,27)	187,687	6,854	365.18	243	12.95	3.55
Utah	(1,3,7,11,16,20-22,26,27)	27,063	886	327.38	22	8.13	2.48
Vermont	(1,7,11,16,20-22,26-28)	16,365	216	131.99	6	3.67	2.78
Virginia	(1,7,19-22,26,27)	64,000*	1,580	246.88	33	5.16	2.09
Washington	(1,7,15,20-22,26,27)	108,082	2,586	239.26	75	6.94	2.90
West Virginia	(1,3,7,8,15,20-24,26,27)	24,505	586	239.13	21	8.57	3.58
Wisconsin	(1,7,16,20-22,26,27)	161,306	2,889	179.10	68	4.22	2.35
Wyoming	(1,7,11,16,20-22,26,27)	18,800	232	123.40	9	4.79	3.88

* Estimated

Footnotes

Registrations: (vehicle types included)
1. Street-legal motorcycles (on-highway and dual purpose)
2. Off-highway motorcycles
3. Mopeds or motorized bicycles (50 cc or less)
4. 3 or 4-wheeled all-terrain vehicles (sometimes known as ATVs or ATCs)
5. Other types of vehicles
6. No description available

Accidents: (vehicle types included)
7. Street-legal motorcycles (on-highway and dual purpose)
8. Off-highway motorcycles
9. Mopeds and motorized bicycles (50 cc or less)
10. 3 or 4-wheeled all-terrain vehicles (sometimes known as ATVs or ATCs)
11. Vehicle types 8, 9 or 10 included only if accident or fatality occurs on public roads
12. Other types of vehicles
13. No description available

Criteria for Reporting Accidents:
14. $0-$199 property damage threshold
15. $200-$399 property damage threshold
16. $400-$599 property damage threshold
17. $600-$1,000 property damage threshold
18. When vehicle is towed
19. No description available

Accidents include:
20. Motorcycle-related accident where property damage occurs (see reporting criteria above.)
21. Motorcycle-related accident where personal injury or fatality occurs
22. Motorcycle-related accidents occurring on public streets/highways
23. Motorcycle-related accidents occurring on nonpublic property
24. Motorcycle-related accidents occurring on public off-highway lands
25. No description available

Fatalities include:
26. Motorcycle operators fatally injured in a motorcycle accident
27. Motorcycle passengers fatally injured in a motorcycle accident
28. Others fatally injured in a motorcycle accident, such as pedestrians, car occupants, bicyclists, etc.
29. No description available

Source: Compiled by Motorcycle Safety Foundation, Irvine, CA., as of July 27, 1990.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS

Each state governs the operation, registration, and licensing of motor vehicles. In general, motorcycles registered for use on public highways are required to meet the equipment requirements in the state in which they are registered. This is in addition to compliance with Federal Motor Vehicle Safety Standards which is required by the motorcycle manufacturers.

The most current state equipment requirements, as of June 1990, are listed below.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS, JUNE, 1990

	SAFETY HELMET	EYE PROTECTION	REARVIEW MIRROR	BRAKES	HANDLEBAR HEIGHT	PASSENGER SEAT.	PASSENGER FOOTRESTS.	PASSENGER HANDHOLD.	HEADPHONES PROHIBITED	TURN SIGNALS	SPEEDOMETER/ ODOMETER	HEADLIGHT DAYTIME USE	PERIODIC INSPECTION
Alabama	•		•	•-13	•-17	•	•						
Alaska	•-5	•-k	•-11	•-13	•-17	•	•	•	•				•-25
Arizona	•-4	•-j	•	•-12	•-17	•	•	•					•-23
Arkansas	•	•	•	•-12		•	•	•				•	•
California	•-9		•	•-13	•-19	•	•		•-n	•-b		•-i	•-25
Colorado		•	•	•-12		•	•		•-o				•-25
Connecticut	•-4	•-j	•	•-13,g	•-17	•	•					•-e	•-25
Delaware	•-1,7	•	•	•-12	•-17	•	•			•			•
Dist. of Col.	•	•-j	•	•-13	•-17,#	•	•	•			•-20		•
Florida	•	•	•	•-13	•-17	•	•		•-o			•	
Georgia	•	•-j	•	•-12	•-17	•	•		•-q			•	
Hawaii	•-1,4	•-j	•	•-12	•-17	•	•						•
Idaho	•-4		•	•-12		•	•						
Illinois		•	•	•-12	•-19	•	•		•-o			•	
Indiana	•-4	•-4		•-13	•-17	•	•					•	
Iowa			•	•-12	•-17	•	•				•	•-h	
Kansas	•-4	•-j	•	•	•-19	•	•			•-b		•-21	•-25
Kentucky	•	•	•	•-12		•	•						
Louisiana	•	•-j	•-10	•-12	•-17	•	•						•
Maine	•-3		•	•-12	•-19	•	•					•	•
Maryland	•-1,4	•-j	•-11	•-12	•-17	•	•	•-#	•-n		•-#		•-24
Massachusetts	•	•-j	•	•-13	•-17	•	•		•				•
Michigan	•	•-2,j	•	•-13	•-17	•							•-25
Minnesota	•-4,m	•-j	•	•-12	•-19	•	•		•-n			•	•-25
Mississippi	•		•	•-12	•-14,#						•-20,#		•
Missouri	•			•-12	•-17,#								•
Montana	•-4		•	•-13		•	•					•	
Nebraska	•			•-12	•-16	•	•						
Nevada	•	•-j	•-11	•-13	•-17	•	•			•			
New Hampshire	•-4	•-j	•	•-12	•-17	•	•	•-#		•	•-#		•
New Jersey	•-1	•-j	•	•-12	•-19	•	•						•
New Mexico	•-1,4	•-j	•	•-13	•-17	•	•						•-25
New York	•-1	•	•	•-13	•-17	•			•-n	•-a,#	•-20,l	•	•
No. Carolina	•		•	•-12		•	•					•	•
No. Dakota	•-1,4		•	•-13	•-17	•	•				•		
Ohio	•-4,8	•-j	•	•-12	•-17	•	•		•-n				•-25
Oklahoma	•-4	•-j	•-11	•-13	•-15	•	•				•-20		•
Oregon	•		•	•-12	•-19	•	•			•-b		•	•-25
Pennsylvania	•	•	•-d,#	•-13	•-19	•	•	•			•-#		•
Rhode Island	•-p	•	•	•-12	•-17	•	•	•	•		•-20,a		•
So. Carolina	•-1,6	•-6,j	•	•-13	•-17	•	•					•	•
So. Dakota	•-4	•-j	•	•-12	•-19	•	•						
Tennessee	•	•-j	•	•-12	•-17	•	•					•	
Texas	•		•	•-13	•-17,#	•							•
Utah	•-4		•	•-12	•-19	•	•	•-#			•-22		•
Vermont	•-1	•-j	•	•	•-17	•	•						•
Virginia	•	•-j	•	•-13,c	•-17	•	•		•				•
Washington	•	•-j	•-11	•-13,a	•-17	•	•		•			•	•-25
W. Virginia	•-1	•	•	•-12	•-17	•	•					•	•
Wisconsin	•-4,m	•-k	•	•-12	•-18	•	•				•	•	•-25
Wyoming	•-4		•	•-12	•-19	•	•					•	

- • Requirement in law
- ◦ If carrying a passenger

1. Reflectorization
2. Where speeds exceed 35 mph
3. Under 15 years, with learner's permit, or for 1 year after obtaining license
4. Under 18 years
5. Under 19 years
6. Under 21 years
7. Possession by all, wear under 19 years & by instruction permit holders
8. Novice license holders
9. Under 15½ years
10. Left side
11. Left and right side
12. One wheel
13. Both wheels
14. Maximum of 10" above fasten point
15. Maximum of 12" above fasten point
16. Maximum of 15" above fasten point
17. Maximum of 15" above seat
18. Maximum of 30" above seat
19. Handgrips below shoulder height
20. Speedometer
21. For motorcycle manufactured after 1/1/78
22. Odometer
23. Annual emissions inspection
24. Upon transfer of title
25. Random

a. If originally equipped by manufacturer
b. For motorcycle manufactured after 1/1/73
c. For motorcycle manufactured after 7/1/74
d. For motorcycle manufactured after 4/1/77
e. For motorcycle manufactured after 1/1/80
f. For motorcycle manufactured after 9/1/80
g. For 1974 or later model year motorcycle
h. For 1977 or later model year motorcycle
i. Manufacturer requirement for motorcycle manufactured after 1/1/78
j. Except if equipped with windscreen
k. Except if equipped with windscreen 15" or higher
m. Instructional permit holders
n. Prohibited in both ears simultaneously
o. Except helmets with speakers
p. For passengers only
q. Prohibited except for communication
Required by inspection regulations

Many state inspection regulations require that any equipment installed on a motorcycle must function properly even though the equipment is not required by law.

Although this chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.

Information concerning equipment requirements in Canada can be obtained from the Motorcycle & Moped Industry Council (MMIC) at 7181 Woodbine Ave., Suite 228A, Markham, Ontario, Canada L3R 1A3; (416) 470-8123

Source: Motorcycle Industry Council, Irvine, California

STATE OFF-HIGHWAY MOTORCYCLE REQUIREMENTS

Off-highway motorcycles and all-terrain vehicles are subject to a wide variety of regulations for use in nearly every state. Individual states may have a vehicle registration program, an operator license requirement or specific equipment requirements. Several states are also developing a special off-highway fund through the registration program or gasoline tax rebates based on the amount of fuel used off-highway. This money is then used for the acquisition, development or maintenance of off-highway vehicle use facilities.

The chart below summarizes the requirements of each state for vehicles and operators as of June, 1990. The requirements specified below do not necessarily apply to ATVs. For information on ATV requirements contact the Specialty Vehicle Institute of America at the address on page 44.

STATE OFF-HIGHWAY MOTORCYCLE REQUIREMENTS, JUNE, 1990

MOTORCYCLE USAGE

State	OFF-HIGHWAY REGISTRATION	VEHICLE TITLE	OPERATOR LICENSE	MINIMUM AGE TO OPERATE	OFF-HIGHWAY EQUIPMENT REQUIREMENTS: LIGHTING	BRAKES	MUFFLER	SPARK ARRESTER	OTHER	RIDER EDUCATION	STATE OHV FUNDING	OHV ADVISORY COUNCIL	TOTAL MOTORCYCLES USED OFF-HIGHWAY AT SOME TIME IN 1989
Alabama													95,400
Alaska				14BH									30,800
Arizona		•					•-f			X	•-m	Yes	82,500
Arkansas												Yes	97,200
California	•-Ad	•			•-K	•	•-Mf	•-N		X	•-T	Yes	412,600
Colorado	•-neo				•-Kjo	•-fo	•-Mf	•-fo			•-S		50,900
Connecticut	•-Ed				•	•	•						31,100
Delaware	•-Dd			12B	•-K	•	•-Mf	•	•-O	X	•-S		7,500
Dist. of Col.		•											100
Florida	•-EeH												131,500
Georgia						•	•						123,200
Hawaii													N/A
Idaho	•-e	•-k					•-M			X	•-T	Yes	39,300
Illinois	•-Fe			6,16B (j & f)	•-K	•	•	•-N	•-Pj		•-T	Yes	88,800
Indiana	•-jDe	•-l		14B		•-L	•				•-S		81,400
Iowa													42,300
Kansas													30,800
Kentucky							•						58,200
Louisiana	•-d	•											86,200
Maine	•-Fe				•-Kf		•-Mf	•	•-W	•-C	•-S		29,000
Maryland	•-eH		•-BH	12H	•-KH	•-H	•-MH				•-S		41,200
Massachusetts	•-Ee			12, 14B, 10g	•	•	•-M	•	•-O				50,200
Michigan	•-Fd (ep)	•-p		16B & a	•-K	•-L	•-Mf	•	•-P	•-o	•-S		166,200
Minnesota		•-l											80,800
Mississippi		•-l											59,400
Missouri		•											89,600
Montana	•-d	•-j									•-sk		27,800
Nebraska													30,600
Nevada		•-l						•					23,300
New Hampshire	•-De		•-CB or a	18B, b or J	•-K	•-L	•-M	•	•-Y	•-GB or b	•-U	Yes	27,800
New Jersey													64,200
New Mexico	•-Ed	•											26,700
New York	•-Fd			16B, 10h	•-Kf	•-L	•-Mf	•-N	•-O	•-c	•-S		143,400
No. Carolina													104,200
No. Dakota							•-MH						14,500
Ohio	•-Ed		•-j	16B, 12l	•	•	•				•-S		131,900
Oklahoma					•-KH		•-H	•-H	•-OH			Yes	55,000
Oregon	•-Ed	•			•-K	•	•-M	•-H			•-T	Yes	69,600
Pennsylvania							•-H	•-NH					160,500
Rhode Island	•-Ee	•		12, 16BH	•-K	•	•-Mf		•-Q				6,900
So. Carolina		•-l											37,700
So. Dakota		•					•						14,900
Tennessee		•					•-H	•-H	•-PH				107,900
Texas		•					•-H	•-NH	•-OH				217,600
Utah	•-jEd	•-Z	•-a	8j, 16a	•-K	•	•		•-R	•-b	•-T	Yes	58,400
Vermont	•-jEd			12b	•-f	•-f	•-Mf						12,600
Virginia													74,000
Washington	•-Dd				•-K	•	•-M	•		X	•-T	Yes	79,600
W. Virginia													57,100
Wisconsin											•-V	Yes	73,400
Wyoming													16,200
U.S. TOTAL													3,624,000

• Requirement in Law

A. Except street-registered OHMs. Identification sticker required to transport competition OHM.
B. Unless supervised.
C. Under age 18.
D. Except street-registered OHMs or OHMs in races.
E. Except street-registered OHMs.
F. Except OHMs in races.
G. For ages 12-17.
H. Applies only on certain state lands.
I. Only if lien exists.
J. Unless at least age 12 & have safety certificate.
K. Night operation only.
L. Specific performance requirements.
M. Decibel sound limit specified.
N. Approved by U.S. Forest Service.
O. Approved helmet.
P. Helmet and eye protection.
Q. 16 sq. in. reflective material each side of OHM and approved helmet.
R. Approved helmet in competitive events or if under 18.
S. Registration and other fees.
T. Fees and gasoline tax allocation.
U. Registration and other fees. Gas tax refund for off-highway use.
V. Special appropriations.
W. Approved helmet if under 18.
X. Safety education & info program available.
Y. Helmet and eye protection if under 18.
Z. For 1988 model year or newer.
a. Unless in possession of safety certificate.
b. Unless operator's license possessed.
c. Ages 10-15 unless supervised.
d. By Motor Vehicle Registration Agency.
e. By Recreation Management Agency.
f. Except in authorized competitive events.
g. In authorized events.
h. With safety certificate.
i. On DNR lands if accompanied by parent.
j. On public lands.
k. Beginning 1/1/91, for transfer of ownership.
m. Legislative appropriation & OHV gas tax allocation.
n. Except OHMs used only for agriculture or in authorized events.
o. Under age 16.
p. Effective 4/1/91.

OHM SOUND LEVEL LIMITS — **TEST PROCEDURES**

CA Manufactured before 1/1/73 92 dBA; 73-74 88 dBA, 75-85 86 dBA, after 85 82 dBA; or 101 dBA. — a,d
CO Manufactured 1971 72 86 dBA; 73 and after 84 dBA; different local limits also permitted. — a
DE Manufactured 1978 and after 88 dBA or EPA limit. — b
ID 92 dBA. — c
MD Manufactured after 6/76 86 dBA; 79 and after 84 dBA. — a
MA 103 dBA. — d
ME Must meet Federal EPA Standards.
MI Model year 1983 and after — EPA limit; additional limits specified in law. — a
NH Manufactured 1973-74 88 dBA, 75-82 86 dBA, after 82 EPA limit. — a
NY Must meet Federal EPA Standards — a
NO 85 dBA. — b
OR In use: model year 1975 and before 102 dBA, 75 and after 99 dBA. Certification: 1977-82. Use: mocal 81 dBA; 83-87 78 dBA; 87 and after 75 dBA. Racing: 105 dBA. — d,a,d

RI Manufactured after 5/72 82 dBA; after 5/74 73 dBA. — a
VT 82 dBA. — e
WA 86 dBA or 105 dBA. — a,d

TEST PROCEDURE

a Acceleration test 50 feet incorporating SAE J331a or similar test method
b Passby test 50 feet
c Passby test 20 feet
d Stationary test 20 inches
e Measured at 50 feet. Test procedure not prescribed.

Although the chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.

Source: Motorcycle Industry Council, Inc., Irvine, California

The Motorcycle Owner

NUMBER OF OWNERS AND RIDERS, OWNER'S SEX, MARITAL STATUS, AGE, EDUCATION

It is estimated that the 6.5 million motorcycles, scooters and ATVs in use were owned by 5.0 million owners in 1989. Based on 1985 consumer research, these vehicles were operated by 8.9 million riders in households owning these vehicles and another 30 million riders in households not owning these vehicles in 1985.

1985 consumer research indicates that 91% of the owners were male and 9% were female, and one half were married. The average owner age was 28 in 1985 compared to 24 in 1980.

High school was the highest level of education attended by about half (53%) of the owners, and almost two fifths (37%) had achieved some college or post graduate education in 1985.

MOTORCYCLE OWNER PROFILE: NUMBER OF OWNERS AND RIDERS, SEX, MARITAL STATUS, AGE, EDUCATION

5,035,000 Estimated Motorcycle, Scooter, and ATV Owners in 1989
8,850,000 Estimated Riders in 1985 in Households Owning These Vehicles*
30,000,000 Estimated Riders in 1985 in Households Not Owning These Vehicles*

*Estimates not available since 1985.

Sex	% of Total Owners '85	% of Total Owners '80
Male	91.3%	92.1%
Female	8.7%	7.9%

Marital Status	% of Total Owners '85	% of Total Owners '80
Single	47.7%	51.7%
Married	50.2%	44.3%
Not Stated	2.1%	4.0%

Age	% of Total Owners '85	% of Total Owners '80
Under 18	16.6%	24.6%
18-24	20.2%	24.3%
25-29	18.6%	14.2%
30-34	13.6%	10.2%
35-39	8.7%	8.8%
40-49	12.5%	9.4%
50 and Over	7.9%	5.7%
Not Stated	1.9%	2.8%
Median Age	27.7 yrs.	24.0 yrs.
Mean Age	29.7 yrs.	26.9 yrs.

Highest Level of Education	% of Total Owners '85	% of Total Owners '80
Grade School	8.6%	13.5%
Some High School	16.0%	18.9%
High School Graduate	36.5%	34.6%
Some College	20.4%	17.6%
College Graduate	12.0%	9.2%
Post Graduate	4.8%	3.1%
Not Stated	1.7%	3.1%

Note: The owner is defined as the primary rider, and the rider is the operator, not the passenger of the vehicle.

Source: 1980 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, April 1981.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.

OWNER OCCUPATION, INCOME, RIDING EXPERIENCE AND MOTORCYCLE OWNERSHIP

Of the owners employed in 1985, 22% were laborers or semi-skilled laborers, another 18% held professional or technical positions, and another 15% were mechanics or craftsmen.

In 1985 about 29% of all owners were students, compared with 27% in 1980.

Of the owners indicating their household income for the prior year, the average income for 1984 was $25,900 compared to $17,500 for 1979.

The average motorcycle owner has been regularly riding for eight years and has owned three motorcycles.

OWNER PROFILE: OCCUPATION, INCOME, RIDING EXPERIENCE, MOTORCYCLE OWNERSHIP

Occupation of Owner	% of Total Owners*	
	'85	'80
Laborer/Semi-Skilled	22.2%	20.7%
Professional/Technical	18.3%	18.8%
Mechanic/Craftsman	14.7%	23.3%
Manager/Proprietor	9.1%	8.6%
Clerical/Sales	8.1%	9.3%
Service Worker	6.4%	7.1%
Farmer/Farm Laborer	6.4%	4.6%
Military	1.6%	1.9%
Other	4.6%	0.0%
Not Stated	8.6%	5.7%

*Based on owners employed.

Household Income for Prior Year	% of Total Owners	
	'85	'80
Under $10,000	10.6%	9.1%
$10,000-$14,999	9.0%	13.0%
$15,000-$19,999	11.2%	13.9%
$20,000-$24,999	8.5%	12.9%
$25,000-$34,999	17.8%	12.5%
$35,000-$49,999	13.9%	5.9%
$50,000 and Over	6.8%	2.4%
Don't Know	22.2%	30.3%
Median	$25,900	$17,500

Years Regularly Riding Motorcycles**	% of Total Owners	
	'85	'80
Under 3	13.9%	21.1%
3-5	22.3%	27.6%
6-10	28.3%	29.8%
Over 10	34.5%	18.6%
Not Stated	1.0%	2.9%
Median (yrs.)	8.0	6.0

**Scooters and ATVs not included.

Total Motorcycles** Ever Owned	% of Total Owners	
	'85	'80
1	22.4%	25.6%
2	20.1%	21.4%
3-4	26.8%	26.5%
5-9	18.5%	16.0%
10 or More	11.0%	7.6%
Not Stated	1.2%	2.9%
Median (cycles)	3.0	3.0

Note: The owner is defined as the primary rider.

Source: 1980 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, April 1981.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February, 1986.

OTHER NATIONAL MOTORCYCLE ORGANIZATIONS

MOTORCYCLE SAFETY FOUNDATION

National Headquarters
2 Jenner Street, Suite 150
Irvine, California 92718
(714) 727-3227

The Motorcycle Safety Foundation (MSF) was organized in 1973 to promote the safe use of motorcycles on the nation's public streets and highways. The MSF cooperates with the National Highway Traffic Safety Administration, state governments and other safety organizations to promote programs and materials to upgrade motorcycle operator education, and motorcycle testing and licensing procedures. Over 3,700 MSF Certified Instructors teach rider education at 826 sites. Locations are available by calling 1-800-447-4700. The MSF has developed numerous publications, research studies and films on motorcycle safety and maintains contact with the media to increase motorcycle safety awareness.

SPECIALTY VEHICLE INSTITUTE OF AMERICA

2 Jenner Street, Suite 150
Irvine, California 92718
(714) 727-3727

The Specialty Vehicle Institute of America (SVIA) was formed in 1983 to foster and promote the safe and responsible use of specialty vehicles manufactured or distributed in the United States. The SVIA has developed and implemented a national ATV rider safety training program, and continues to work on developing ATV voluntary standards, promoting model state legislation on ATV riding, and serving as a liaison with state and Federal agencies on ATV training and environmental issues.

ATV SAFETY INSTITUTE

2 Jenner Street, Suite 150
Irvine, California 92718
(714) 727-3727

The ATV Safety Institute (ASI), a division of the Specialty Vehicle Institute of America, was formed in 1988 to implement an expanded national program of all-terrain vehicle (ATV) safety education and awareness, based on SVIA safety programs developed since 1983. The ASI also offers an extensive array of safety publications to promote the safe and responsible use of ATVs. Information on the ATV RiderCourse and other ASI safety programs is available by calling 1-800-447-4700.

AMERICAN MOTORCYCLIST ASSOCIATION

P.O. Box 6114
33 Collegeview Road
Westerville, Ohio 43081-6114
(614) 891-2425
Membership Information 1-800-AMA-JOIN
1-800-AMA-4567 (Ohio only)

The American Motorcyclist Association, founded in 1924, is a voluntary membership organization for individuals who own and ride motorcycles. With a membership of over 170,000, the AMA has approximately 1,100 chartered clubs throughout the nation. The AMA sanctions over 4,000 amateur and professional events per year for the off-road and road riding enthusiast. The AMA also sponsors programs and contests to encourage involvement by motorcyclists in charitable work and community service. The AMA works with various government agencies and private organizations to promote and protect the interest of the American motorcyclist.

MOTORCYCLE RIDERS FOUNDATION

P.O. Box 1808
Washington, D.C. 20013-1808
(202) 944-4920
Membership Information: (612) 522-8024

The Motorcycle Riders Foundation, founded in 1987, is a Washington, D.C. based grassroots motorcyclist organization. The MRF is supported by State Motorcyclist Rights Organizations and through individual memberships. The MRF publishes a quarterly journal and a quarterly information bulletin. The MRF sponsors an annual national educational seminar for motorcyclist rights activists. The MRF works on the Federal and state levels to protect the rights and interests of motorcyclists.

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While this information is thought to be the most accurate available at the date of publication, the Motorcycle Industry Council assumes no responsibility for accuracy or completeness.
Additions and corrections are solicited for future publications.

Index

Accessories sales ... 25, 26
Accidents, traffic ... 38
Aftermarket:
- Dealer sales ... 25, 26
- Dollar volume ... 25
- Retail outlets ... 24, 25, 26

Age:
- Motorcycle, average ... 18
- Owner ... 42

American Motorcyclist Association ... 44
ATV Safety Institute ... 44
Brand market share ... 17
Commuting ... 33
Dealers:
- Employee payroll ... 24, 26
- Employees, number of ... 24, 26
- Retail outlets ... 24
- Retail sales ... 11, 12, 25, 26
- State associations ... 45, 46
- Years in business ... 26

Economic value:
- Aftermarket sales ... 25, 26
- Dealer sales ... 25
- Imports ... 13, 14
- Industry by state ... 11
- Off-highway industry by state ... 29
- Retail sales ... 11, 12
- Wholesale sales ... 13, 15

Education:
- Owner's level of ... 42
- Rider training programs ... 34, 35

Engine displacement:
- Fuel economy ... 33
- Imports ... 14
- Population, motorcycle ... 6, 7
- Wholesale sales ... 15

Equipment requirements, state ... 39, 40
Fatalities, traffic ... 38
Fuel Economy ... 33
Imports ... 13, 14
Income, owner household ... 43
Licensing programs & procedures, state ... 36, 37
Manufacturers & distributors 20, 21, 22
Mileage:
- Average ... 32
- Miles per gallon ... 33
- Model type ... 30, 31, 32
- On & off-highway ... 30, 31, 32
- Total motorcycle ... 30, 31

Model type:
- Fuel economy ... 33
- Mileage ... 30, 31, 32
- Population, motorcycle ... 6, 7, 8
- Retail sales ... 12
- Usage on & off-highway ... 28
- Wholesale sales ... 15

Motorcycle Industry Council:
- Membership ... 3
- Programs & publications ... 2

Motorcycle Riders Foundation ... 44
Motorcycle Safety Foundation ... 34, 35, 36, 37, 38, 44
Mopeds (motorized bicycles):
- Imports ... 14

Occupation, owner's ... 43
Operability rate ... 18
Ownership:
- Owners, characteristics of ... 42, 43
- Owners, number of ... 42
- Previous ownership ... 43

Parts sales ... 25, 26
Penetration, motorcycle ... 8, 29
Population, motorcycle:
- Engine displacement ... 6, 7
- Model type ... 6, 7, 8
- Off-highway ... 28, 29
- Penetration ... 8, 29
- Region ... 8
- State ... 8, 29
- Year sold ... 6

Production, U.S. ... 13
Public land ... 29
Region, population by ... 8
Registrations:
- Brand market share ... 17
- New registrations ... 13, 16, 17
- Total registrations ... 9, 10, 38

Retail outlets ... 24, 25, 26
Retail sales:
- Dealer ... 25, 26
- New motorcycles ... 11, 12, 25, 26, 29
- Parts & accessories ... 25, 26
- Service ... 25, 26
- Used motorcycles ... 25, 26

Rider Education ... 34, 35, 44
Scrappage/retired rate ... 18
Servicing, dealer sales ... 25, 26
Sex of owner ... 42
Specialty Vehicle Institute of America ... 44
State:
- Accidents & fatalities ... 38
- Economic value of industry ... 11, 29
- Equipment requirements ... 39, 40
- Licensing ... 36, 37
- Motorcycle penetration ... 8, 29
- Motorcycle population ... 8, 29
- Off-highway motorcycle requirements ... 40
- Operator Licensing ... 36, 37
- Public land ... 29
- Registrations ... 10, 16, 38
- Retail outlets ... 24
- Retail sales ... 11, 27, 29
- Rider Education Programs ... 35
- Usage on & off-highway ... 28, 29
- Wholesale sales ... 15

Usage:
- Mileage ... 30, 31, 32
- Model type ... 28, 30, 31, 32
- On & off-highway ... 28-33
- Operability rate ... 18
- Scrappage rate ... 18
- Seasonal ... 32
- Weekend ... 32

Wholesale sales ... 13, 15